Travel Activities & Motivation Survey

Interest In Downhill Skiing and Snowboarding

Profile Report

TAMS
Travel Activities & Motivation Survey

July, 2001

Lang RESEARCH

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Travel Activities & Motivation Survey

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Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

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Interest in Downhill Skiing and Snowboarding

- Key Findings -

22.0 % of American travellers and 28.6 % of Canadian travellers have at least a moderate interest in downhill skiing and snowboarding (i.e., participated in downhill skiing and snowboarding at least occasionally while not travelling or while travelling in the last two years). Canadians were 43 % more likely than Americans to be classified as Downhill Skiing and Snowboarding Enthusiasts (i.e., frequently participated in downhill skiing and snowboarding while not travelling, and participated in either downhill skiing or snowboarding while on a trip at least once in the last two years; or occasionally participated in downhill skiing and snowboarding while not travelling, and participated in both downhill skiing and snowboarding while on a trip in the last two years).

Male travellers were 38 % more likely (in both Canada and the United States) to be Downhill Skiing and Snowboarding Enthusiasts than female travellers. As well, in both countries, the level of interest in downhill skiing and snowboarding is highest among those under 35 years old who are single, and declines as the age of the respondent increases. Participating in downhill skiing and snowboarding is higher among those with a university or college education, and tends to increase as household income increases. As such, the prime target market for downhill skiing and snowboarding is younger affluent singles, couples and families.

In Canada, the likelihood that a trip will be taken domestically over the next two years increases from 65 % among those with a low interest in downhill skiing and snowboarding to 82 % among those considered Downhill Skiing and Snowboarding Enthusiasts. In the United States, the likelihood that a trip will be taken to Canada over the next two years increases from 16 % among those with a low interest in downhill skiing and snowboarding to 28 % among those considered Downhill Skiing and Snowboarding Enthusiasts.

Downhill Skiing and Snowboarding Enthusiasts were more likely to have sought out vacation experiences associated with sports and learning (e.g ., to participate in a hobby or sport). They were also more likely to have pursued romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote downhill skiing and snowboarding-related tourism should emphasize the opportunities for other sports and the opportunities for relaxation and romance offered by the destination.

Interest in Downhill Skiing and Snowboarding

- Key Findings (Continued) -

Those who participate in downhill skiing and snowboarding were more likely to be active in outdoor activities while travelling. This is especially apparent among Downhill Skiing and Snowboarding Enthusiasts, who tend to be younger and more affluent and therefore more active in outdoor activities (in general) while travelling.

Downhill Skiing and Snowboarding Enthusiasts were more likely to have taken part in other extreme winter sports, canoeing and kayaking, fitness and skating. Combining downhill skiing and snowboarding with opportunities to take part in other winter sports may be particularly appealing to the Downhill Skiing and Snowboarding Enthusiasts.

Downhill Skiing and Snowboarding Enthusiasts were more likely to rely on the advice of family and friends and on information gathered from the Internet when planning their vacations than others. They also consulted a larger variety of information sources, especially travel agents, newspaper and magazine articles, airline reservation systems, and travel guides (such as Fodor's and Michelin).

In terms of interest in new tourism products, Downhill Skiing and Snowboarding Enthusiasts were generally less interested in the new attractions relative to those with only moderate or low interest in skiing/snowboarding. However, those with an interest in skiing and snowboarding expressed greater interest in wine tours than those with low interest in skiing/snowboarding.

As would be expected, Downhill Skiing and Snowboarding Enthusiasts are much more likely to read sports magazines. As such, these may be the most efficient media channels to reach this audience. Downhill Skiing and Snowboarding Enthusiasts are also more likely to read news magazines, the travel section of their daily newspaper, and other newspapers.

Downhill Skiing and Snowboarding Enthusiasts are much more likely to use the Internet as an information source and also to book a trip over the Internet than those less interested in skiing/snowboarding.

The impressions of American and Canadian travellers of Canada as a nature and outdoor destination are more positive as the level of interest in downhill skiing and snowboarding increases. However, among American travellers, the image of Canada and of Ontario as a place to go for culture and entertainment decreases as interest in skiing/snowboarding increases.

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Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years, or expressed interest in travel in the next two years, were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these, 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire, while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in downhill skiing and snowboarding while not travelling as well as downhill skiing and snowboarding-related activities while on vacation. The database was used to identify sectors of the market that exhibit a moderate interest and high interest (Enthusiasts) in downhill skiing and snowboarding. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario relative to the interest shown in downhill skiing and snowboarding. This report also provides an Overall Market Potential of each segment of the market, identifying those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's and Ontario's downhill skiing and snowboarding vacation products.

Downhill Skiing and Snowboarding Interest Index

Construction of the Index

The TAMS Mailback Survey contained three items specifically associated with Downhill Skiing and Snowboarding that were used to construct an overall Downhill Skiing and Snowboarding Interest Index. These were:

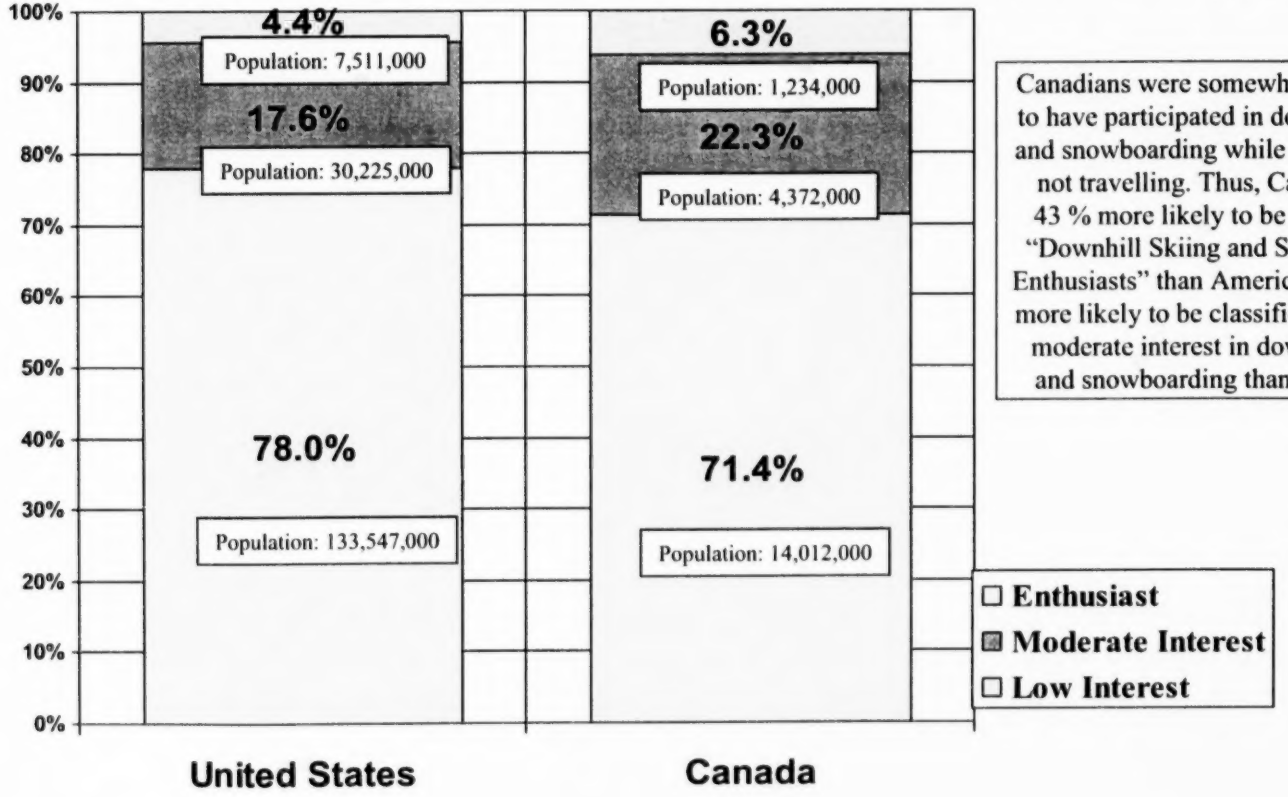
- Whether the respondent had participated in downhill skiing and snowboarding while not travelling "frequently", "occasionally", "rarely" or "not at all"
- Whether the respondent had participated in downhill skiing while on a trip
- Whether the respondent had participated in snowboarding while on a trip

The responses to the first of these items (i.e., the extent to which the respondent participated in downhill skiing and snowboarding while not travelling) was converted into a four-point scale where "Not at all" was set to "0", "Rarely" was set to "1", "Occasionally" was set to "2" and "Frequently" was set to "3". The two downhill skiing and snowboarding-related travel activities were converted into binary variables where "0" was "Did not participate" and "1" was "Did Participate". The three items were summed up to produce an overall score ranging from "0" to "5". This score was reduced to three levels as follows: A score of "0" was set to "No downhill skiing and snowboarding activity", a score between "1" and "3" was set to "Occasional Downhill Skier/Snowboarder " and a score between "4" and "5" was set to "Downhill Skier/Snowboarder Enthusiast ".

This scoring scheme meant that in order to qualify as a Downhill Skiing and Snowboarding "Enthusiast", it was necessary for those who occasionally went downhill skiing or snowboarding while not on vacation, to have participated in both downhill skiing and snowboarding while on a trip during the past two years; and for those who frequently went downhill skiing or snowboarding while not on vacation, to have participated in either downhill skiing or snowboarding while on a trip during the past two years.

Interest in Downhill Skiing and Snowboarding
Canada versus United States
While Travelling and Not Travelling

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

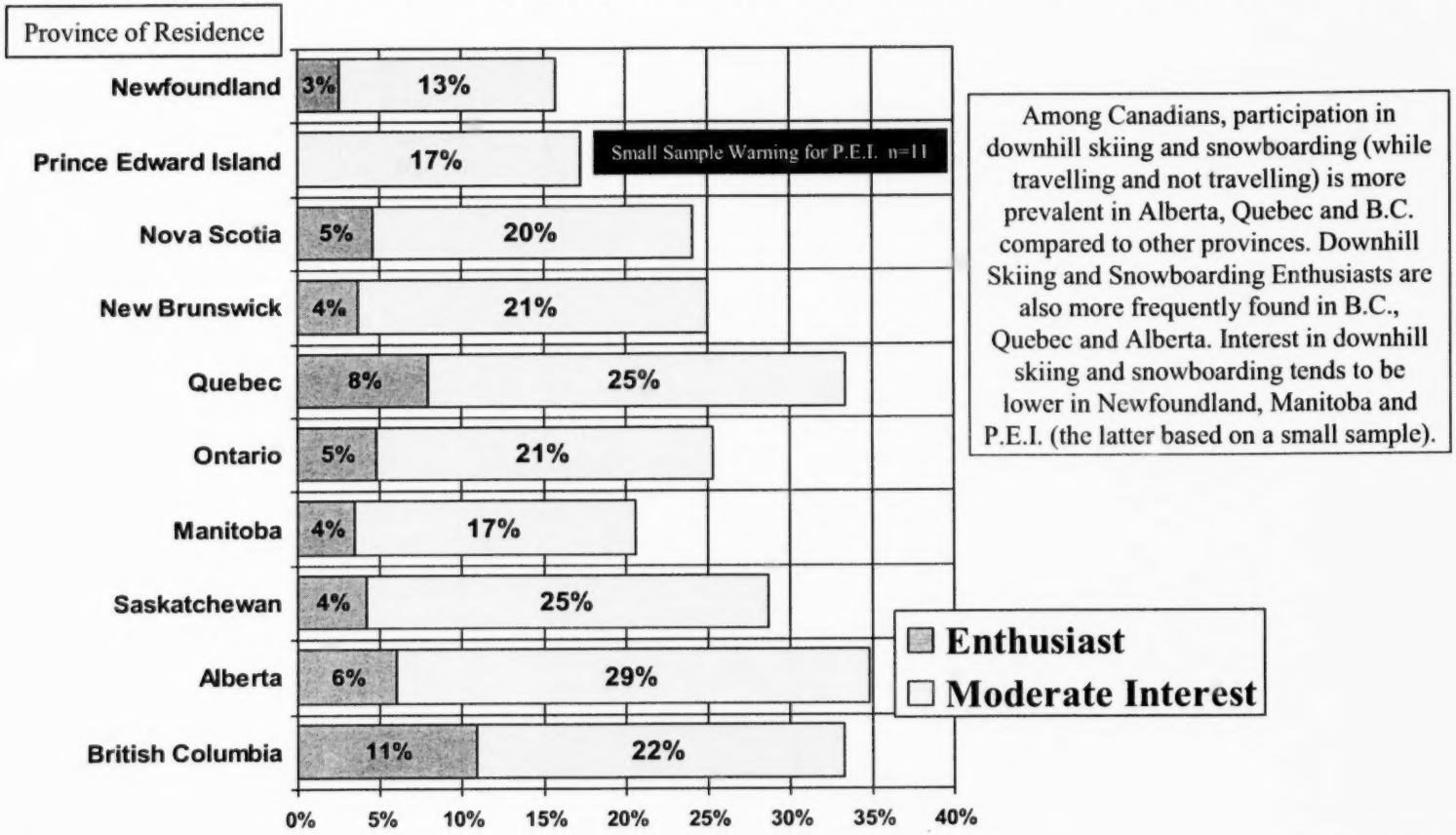


Canadians were somewhat more likely to have participated in downhill skiing and snowboarding while travelling and not travelling. Thus, Canadians are 43 % more likely to be classified as "Downhill Skiing and Snowboarding Enthusiasts" than Americans, and 27 % more likely to be classified as having a moderate interest in downhill skiing and snowboarding than Americans.

Interest in Downhill Skiing and Snowboarding

Canada: By Province

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

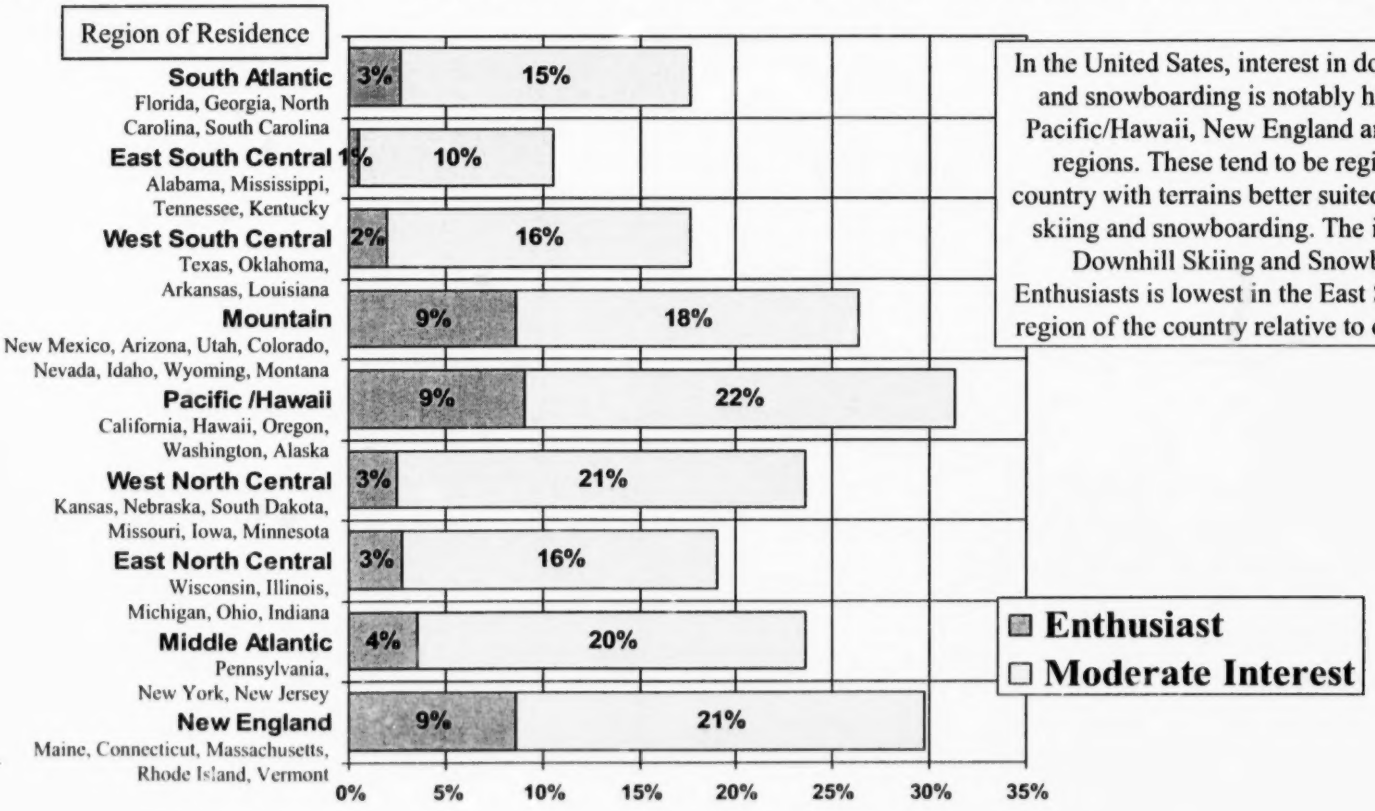


Among Canadians, participation in downhill skiing and snowboarding (while travelling and not travelling) is more prevalent in Alberta, Quebec and B.C. compared to other provinces. Downhill Skiing and Snowboarding Enthusiasts are also more frequently found in B.C., Quebec and Alberta. Interest in downhill skiing and snowboarding tends to be lower in Newfoundland, Manitoba and P.E.I. (the latter based on a small sample).

Interest in Downhill Skiing and Snowboarding

United States: By Region

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



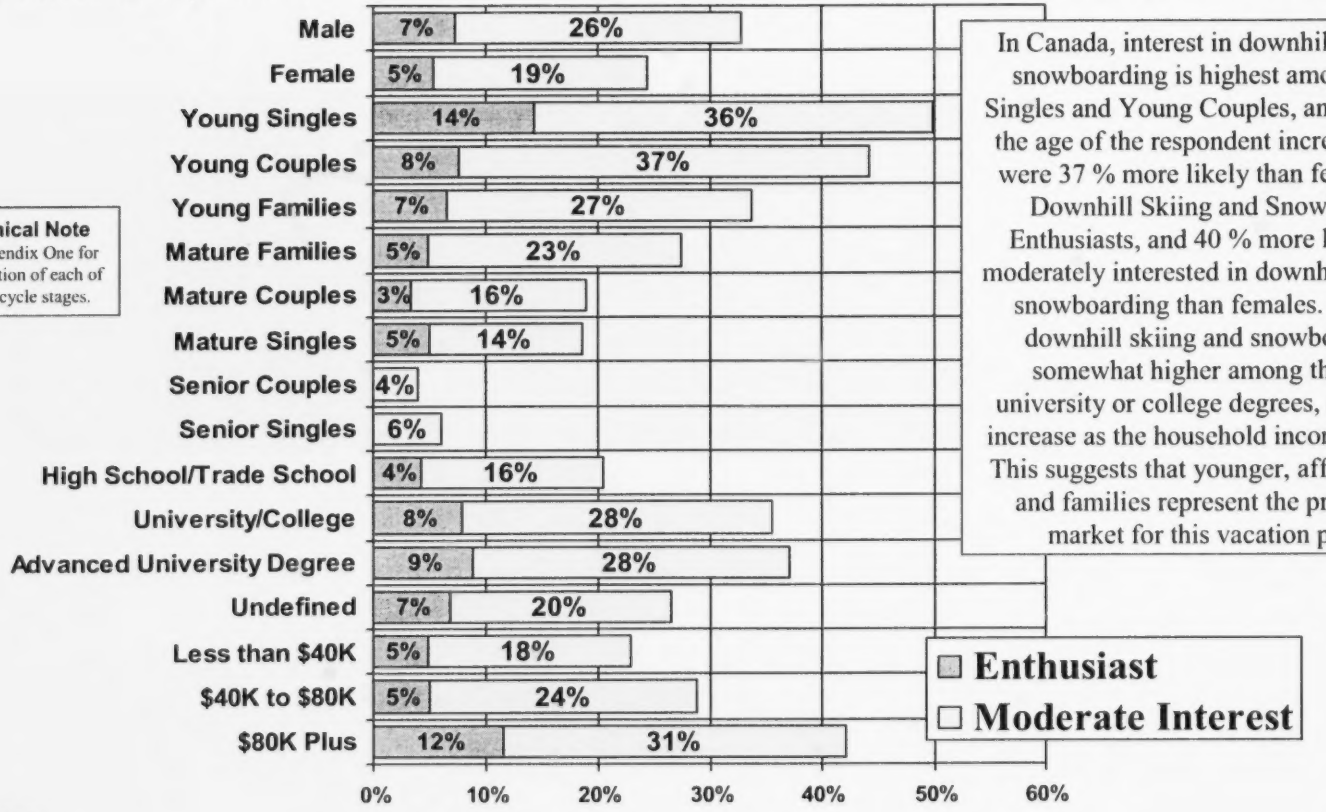
In the United Sates, interest in downhill skiing and snowboarding is notably higher in the Pacific/Hawaii, New England and Mountain regions. These tend to be regions of the country with terrains better suited for downhill skiing and snowboarding. The incidence of Downhill Skiing and Snowboarding Enthusiasts is lowest in the East South Central region of the country relative to other regions.

Interest in Downhill Skiing and Snowboarding

Canada: By Demographics

Based on Day-to-Day and Past Vacation Activity

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Technical Note
See Appendix One for a description of each of the life cycle stages.

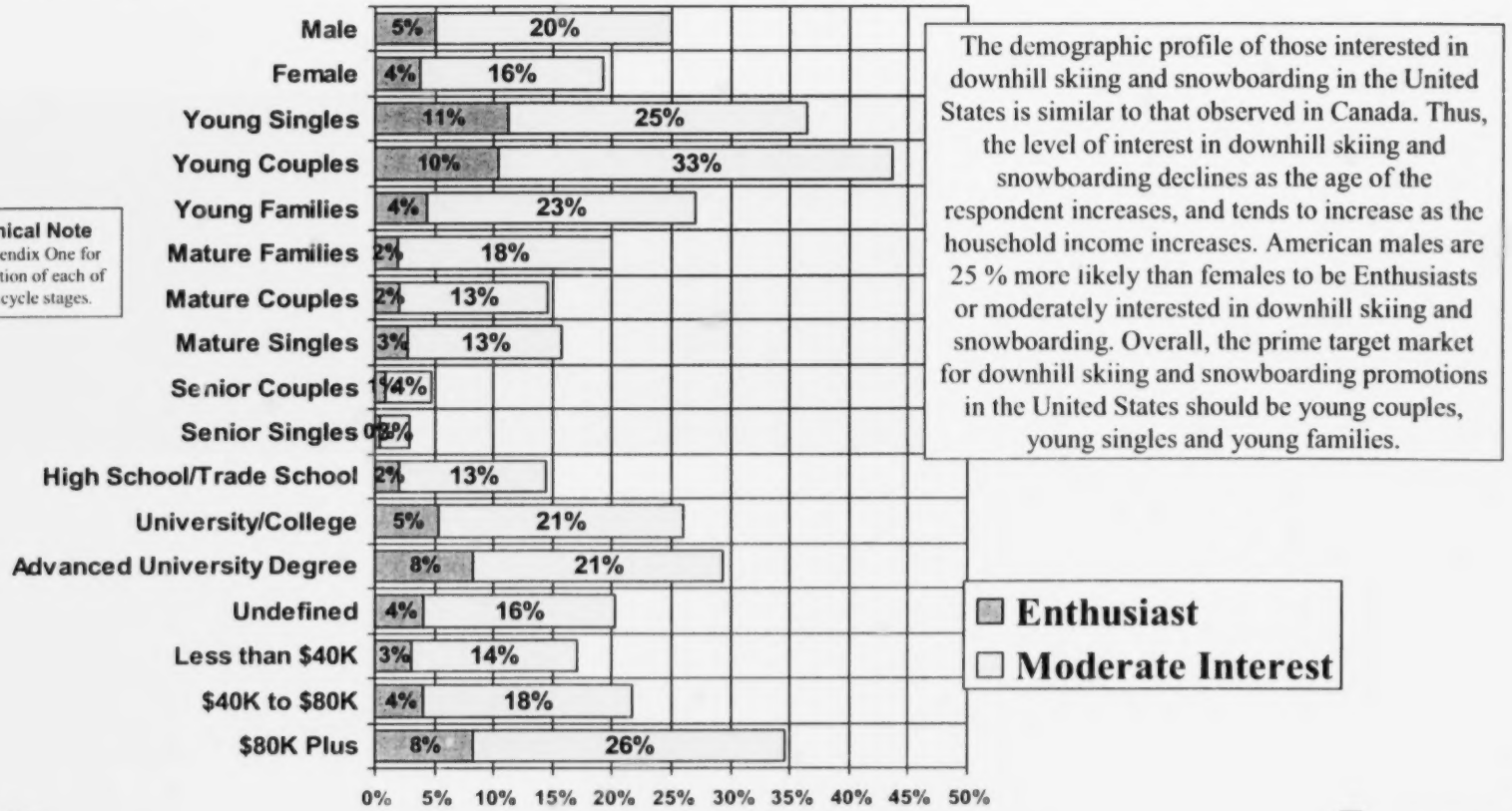
In Canada, interest in downhill skiing and snowboarding is highest among Young Singles and Young Couples, and declines as the age of the respondent increases. Males were 37 % more likely than females to be Downhill Skiing and Snowboarding Enthusiasts, and 40 % more likely to be moderately interested in downhill skiing and snowboarding than females. Interest in downhill skiing and snowboarding is somewhat higher among those with university or college degrees, and tends to increase as the household income increases. This suggests that younger, affluent singles and families represent the prime target market for this vacation product.

Interest in Downhill Skiing and Snowboarding

United States: By Demographics

Based on Day-to-Day and Past Vacation Activity

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years


Male 5% 20%
Female 4% 16%
Young Singles 11% 25%
Young Couples 10% 33%
Young Families 4% 23%
Mature Families 2% 18%
Mature Couples 2% 13%
Mature Singles 3% 13%
Senior Couples 1% 4%
Senior Singles 0% 3%
High School/Trade School 2% 13%
University/College 5% 21%
Advanced University Degree 8% 21%
Undefined 4% 16%
Less than $40K 3% 14%
$40K to $80K 4% 18%
$80K Plus 8% 26%
0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%
Enthusiast
Moderate Interest

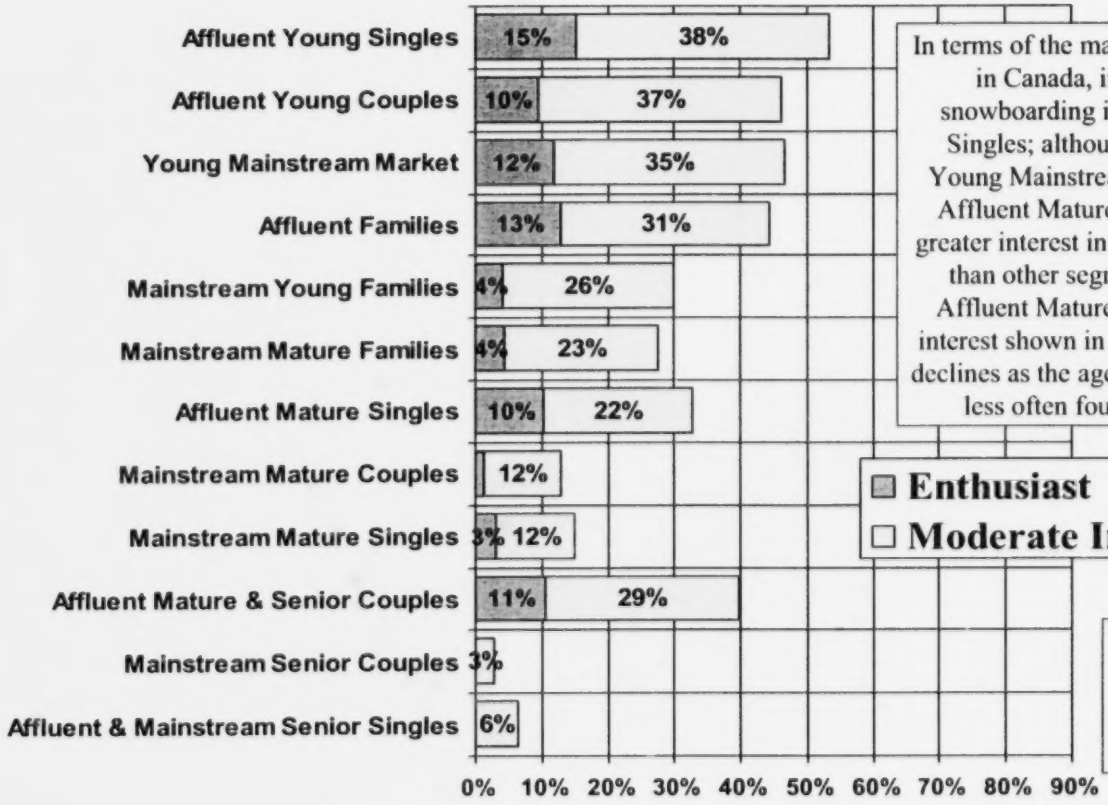
Technical Note
See Appendix One for a description of each of the life cycle stages.

The demographic profile of those interested in downhill skiing and snowboarding in the United States is similar to that observed in Canada. Thus, the level of interest in downhill skiing and snowboarding declines as the age of the respondent increases, and tends to increase as the household income increases. American males are 25 % more likely than females to be Enthusiasts or moderately interested in downhill skiing and snowboarding. Overall, the prime target market for downhill skiing and snowboarding promotions in the United States should be young couples, young singles and young families.

Interest in Downhill Skiing and Snowboarding

Canada: By Market Segment

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



In terms of the market segments (see technical notes) in Canada, interest in downhill skiing and snowboarding is highest among Affluent Young Singles; although Affluent Young Couples, the Young Mainstream Market, Affluent Families and Affluent Mature and Senior Couples also exhibit greater interest in downhill skiing and snowboarding than other segments. With the exception of the Affluent Mature and Senior Couples, the level of interest shown in downhill skiing and snowboarding declines as the age of the respondent increases, and is less often found within the senior segments.

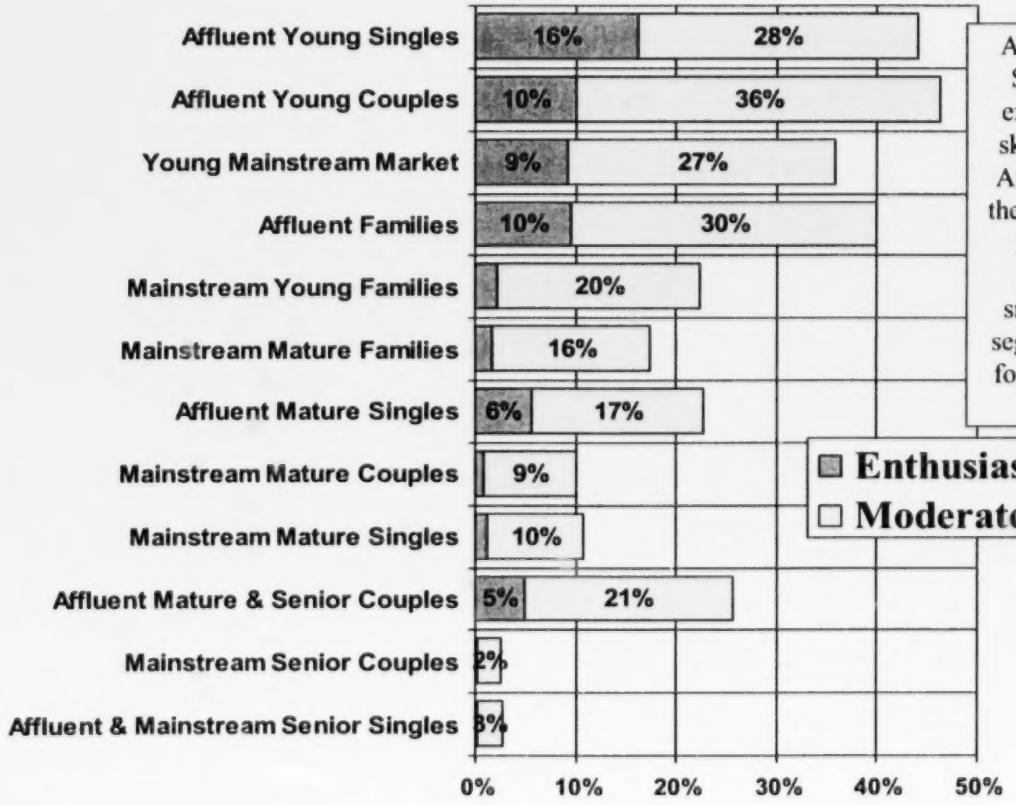
Technical Note

The market segments used in this analysis have been derived using the Ontario Tourism Marketing Partnership (OTMP) tracking database. See Appendix Two for a description of each of these segments.

Interest in Downhill Skiing and Snowboarding

United States: By Market Segment

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



A similar pattern is observed in the United States, with the Affluent Young Couples exhibiting the greatest interest in downhill skiing and snowboarding. As with Canada, Affluent Young Singles, Affluent Families, the Young Mainstream Market, and Affluent Mature and Senior Couples also exhibit greater interest in downhill skiing and snowboarding than other segments. These segments represent the prime target markets for tourism products which have a downhill skiing and snowboarding theme.

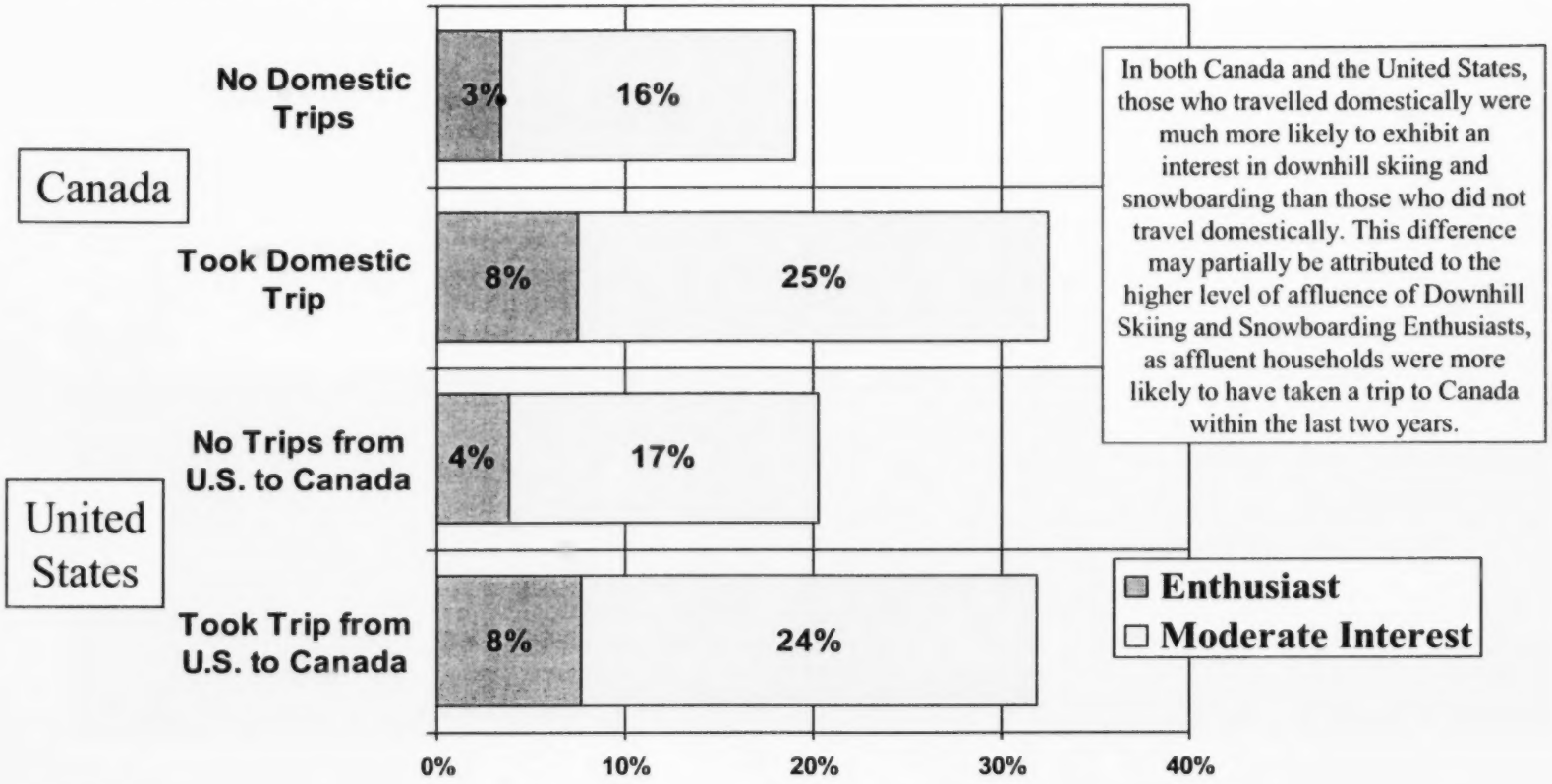
Technical Note

The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Downhill Skiing and Snowboarding

Canada vs. U.S.: By Trips In Canada Last Two Years

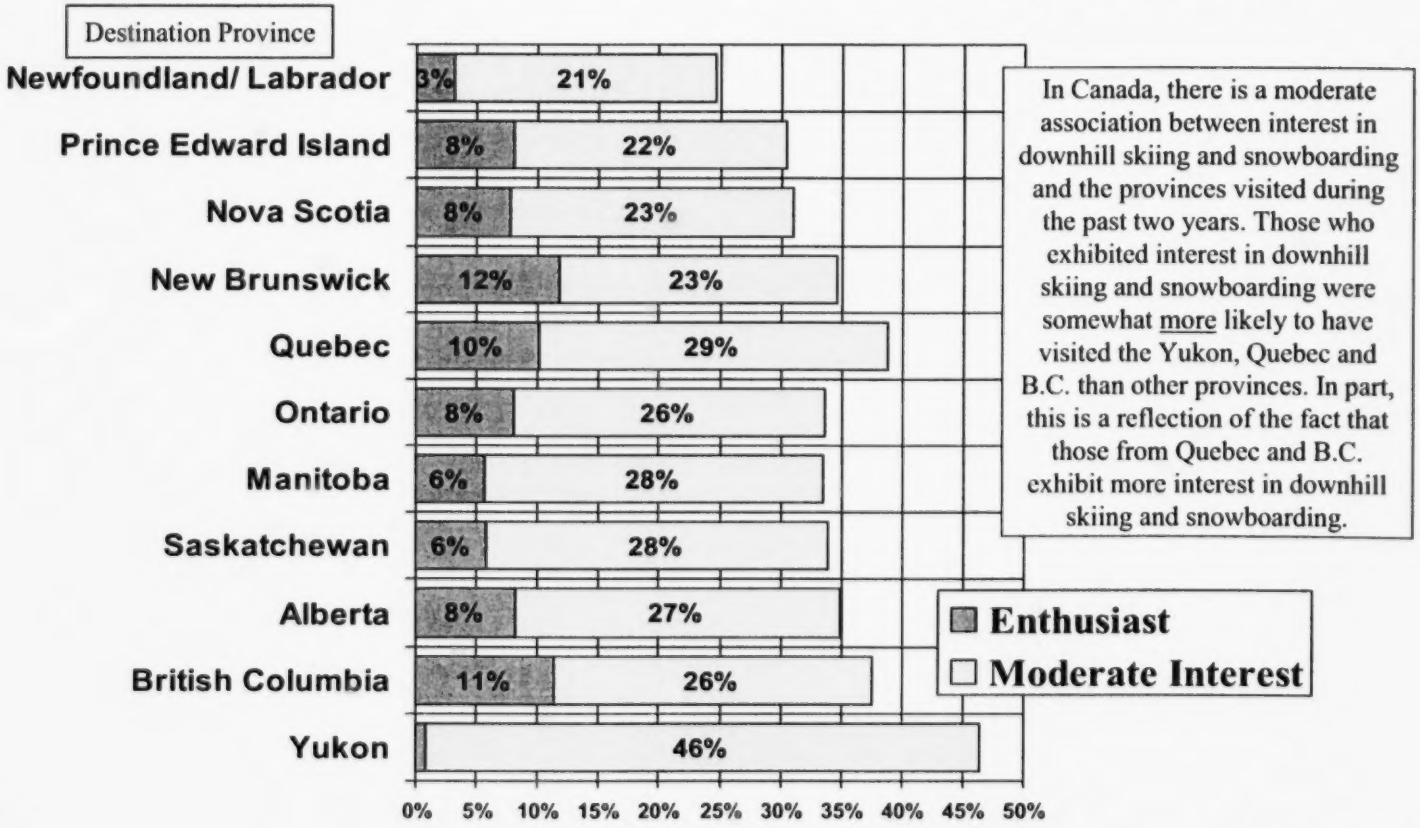
Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years


Canada
No Domestic Trips
3%
16%
Took Domestic Trip
8%
25%
United States
No Trips from U.S. to Canada
4%
17%
Took Trip from U.S. to Canada
8%
24%
0%
10%
20%
30%
40%
Enthusiast
Moderate Interest
In both Canada and the United States, those who travelled domestically were much more likely to exhibit an interest in downhill skiing and snowboarding than those who did not travel domestically. This difference may partially be attributed to the higher level of affluence of Downhill Skiing and Snowboarding Enthusiasts, as affluent households were more likely to have taken a trip to Canada within the last two years.

Interest in Downhill Skiing and Snowboarding

Canada: Interest By Province Travelled To

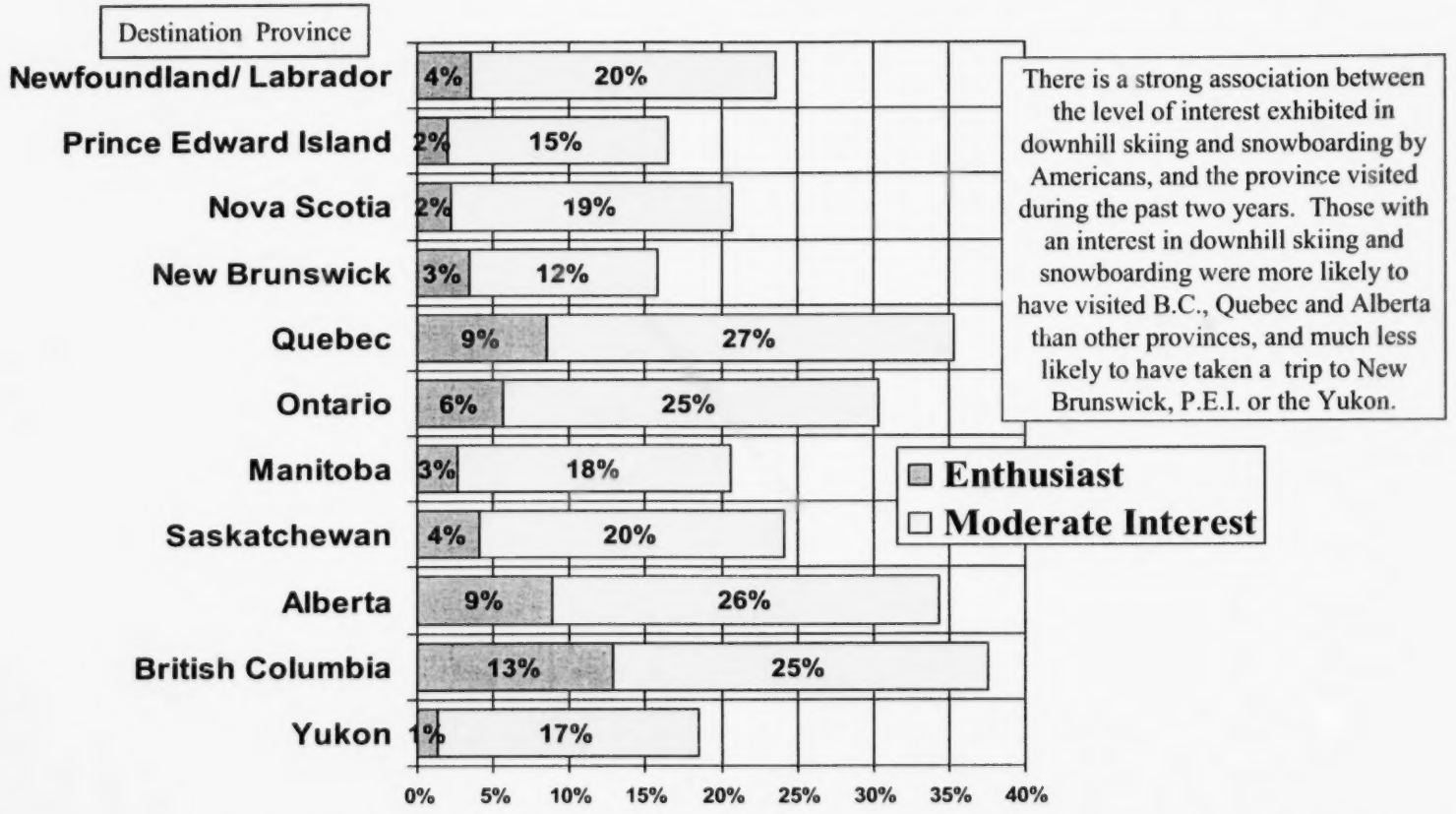
Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



Interest in Downhill Skiing and Snowboarding

United States: Interest By Province Travelled To

Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



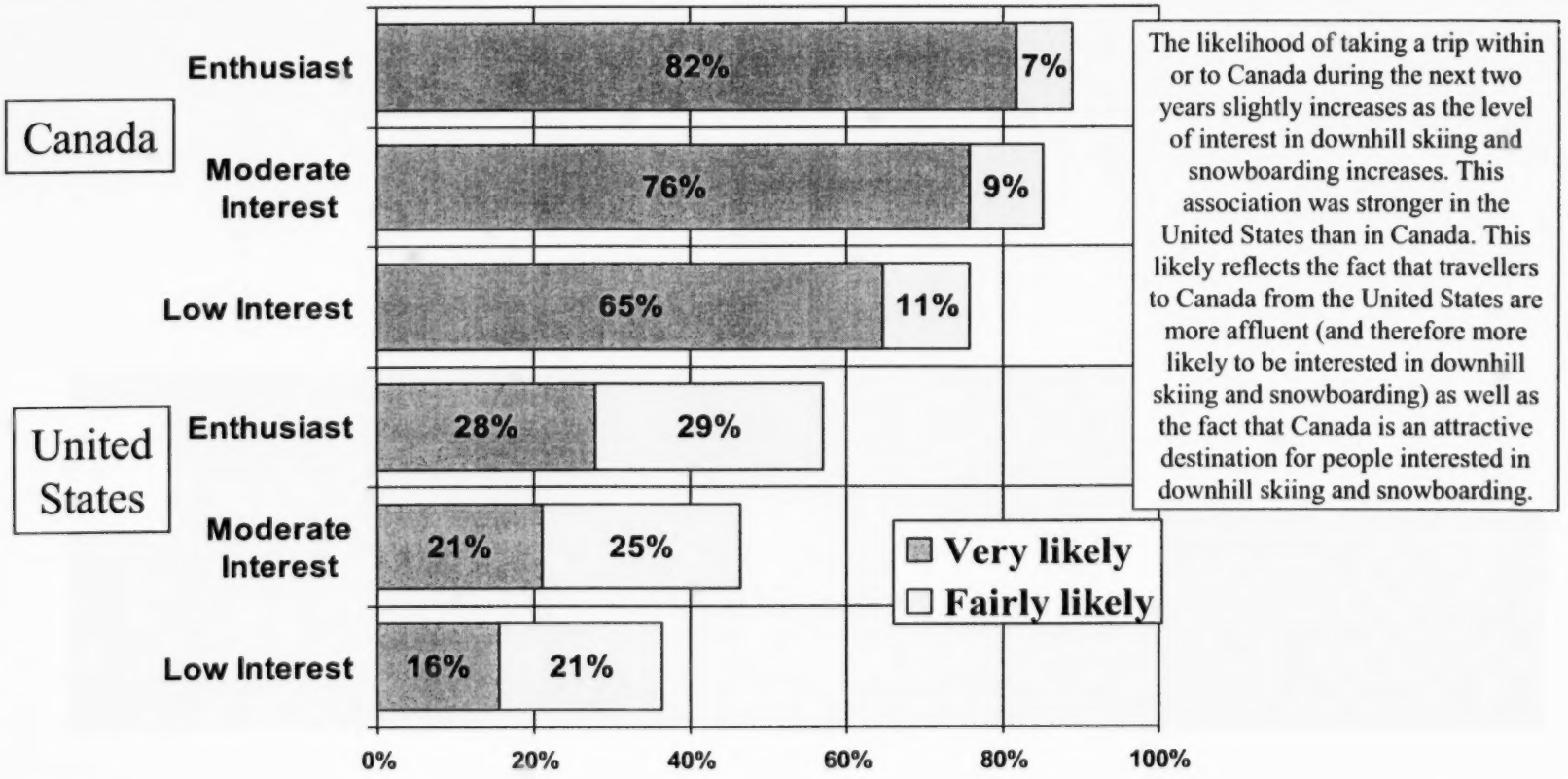
There is a strong association between the level of interest exhibited in downhill skiing and snowboarding by Americans, and the province visited during the past two years. Those with an interest in downhill skiing and snowboarding were more likely to have visited B.C., Quebec and Alberta than other provinces, and much less likely to have taken a trip to New Brunswick, P.E.I. or the Yukon.

Interest in Downhill Skiing and Snowboarding

Intentions to Travel to Canada Next Two Years

Interest in Downhill Skiing and Snowboarding By Intentions to Travel in Canada During Next Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

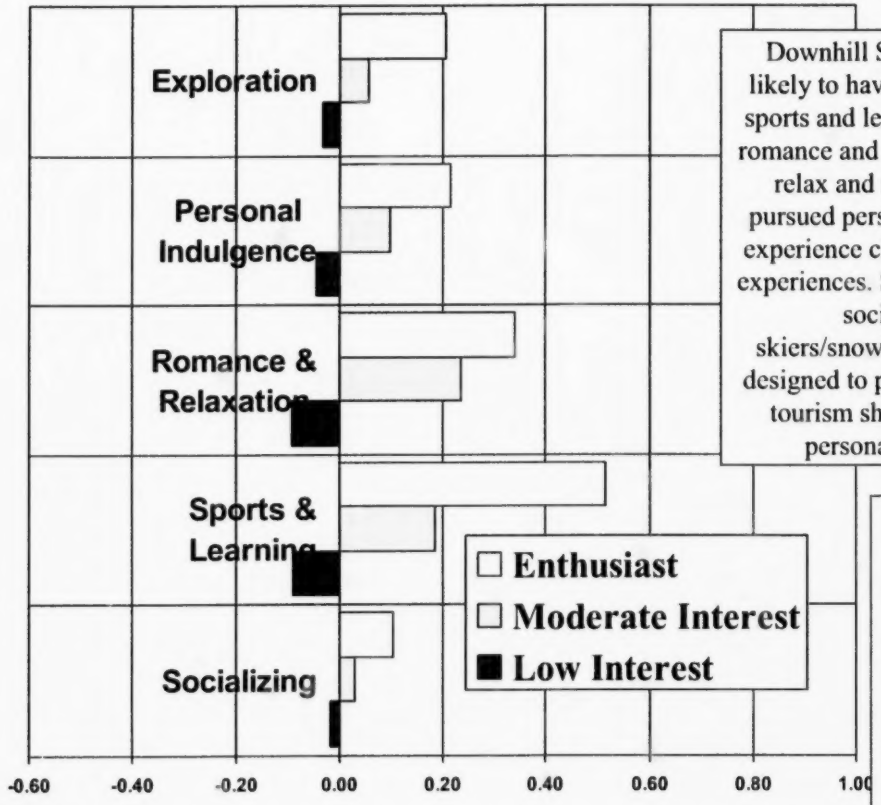


The likelihood of taking a trip within or to Canada during the next two years slightly increases as the level of interest in downhill skiing and snowboarding increases. This association was stronger in the United States than in Canada. This likely reflects the fact that travellers to Canada from the United States are more affluent (and therefore more likely to be interested in downhill skiing and snowboarding) as well as the fact that Canada is an attractive destination for people interested in downhill skiing and snowboarding.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Downhill Skiing and Snowboarding Enthusiasts were more likely to have sought out vacation experiences associated with sports and learning (e.g., to participate in a hobby or sport) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). They were also more likely to have pursued personal indulgence (e.g., to experience the good life, experience city life such as night life) and exploratory vacation experiences. Skiers/snowboarders are slightly more interested in socializing with family and friends than non-skiers/snowboarders. Advertising and promotional materials designed to promote downhill skiing and snowboarding-related tourism should emphasize the opportunities for relaxation, personal indulgence, entertainment and exploration.

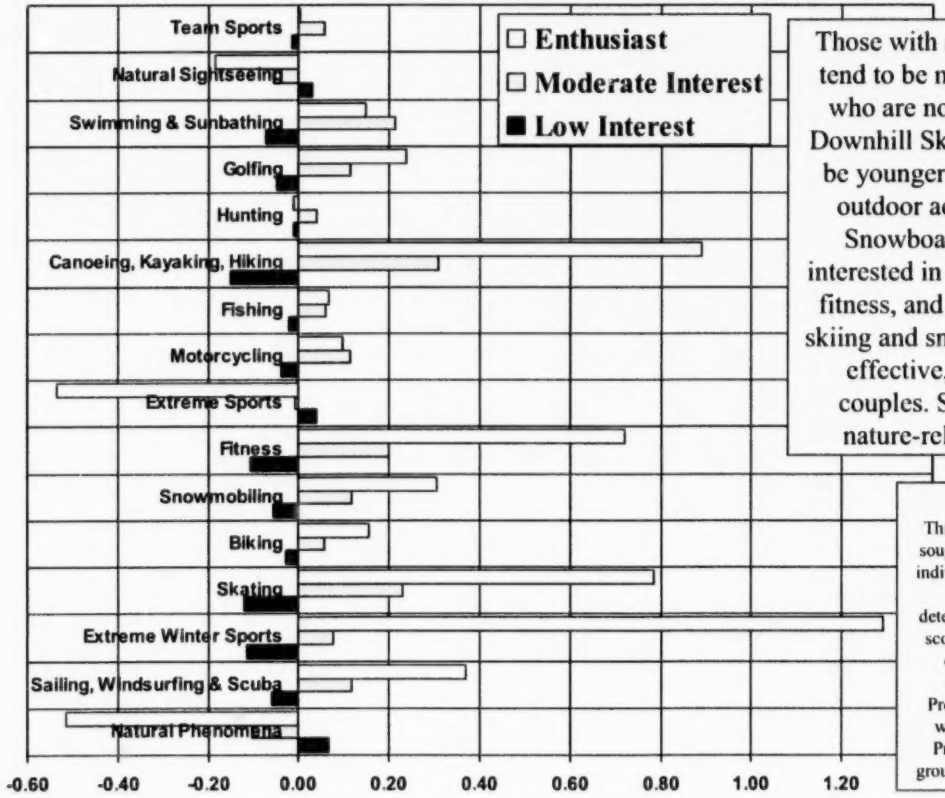
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those with an interest in downhill skiing and snowboarding tend to be more active in most outdoor activities than those who are not interested. This is especially apparent among Downhill Skiing and Snowboarding Enthusiasts, who tend to be younger and more affluent and therefore more active in outdoor activities while travelling. Downhill Skiing and Snowboarding Enthusiasts were especially likely to be interested in participating in extreme winter sports, canoeing, fitness, and skating. Combining these activities in downhill skiing and snowboarding tourism packages may be especially effective, particularly for younger affluent singles and couples. Skiers/snowboarders are less likely to seek out nature-related activities than non-skiers/snowboarders.

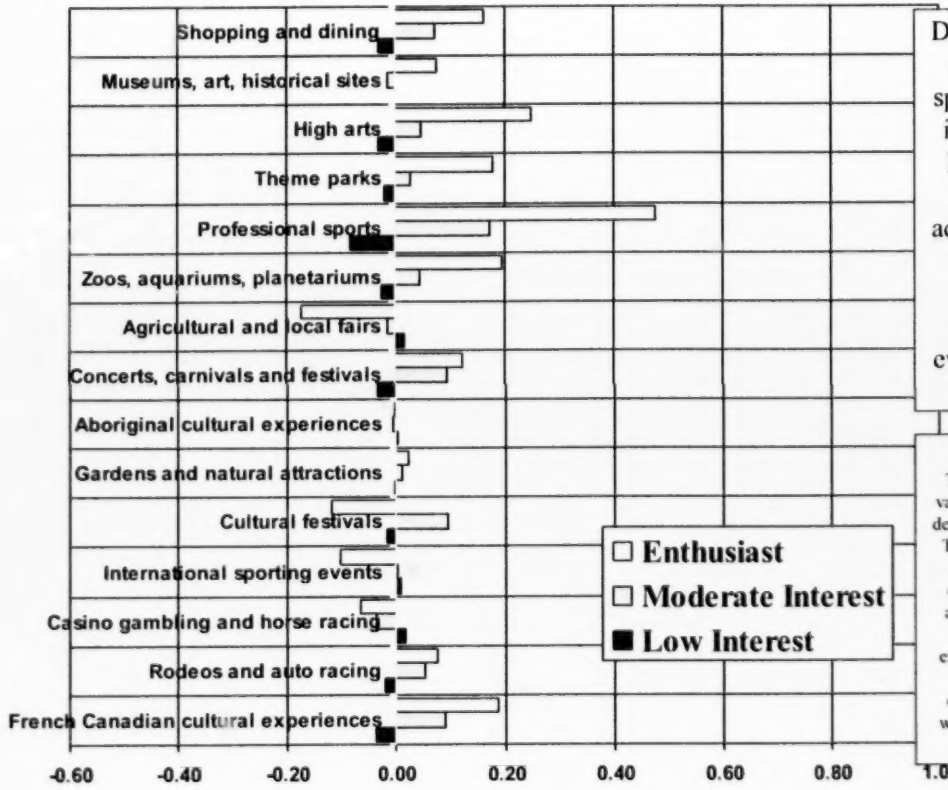
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Downhill Skiing and Snowboarding Enthusiasts are more interested in attending professional sports events than those with a moderate or low interest in downhill skiing and snowboarding. Enthusiasts are also somewhat more likely to visit high arts performances, zoos and aquariums, and theme parks, and to participated in shopping and dining. Thus, combining downhill skiing and snowboarding with opportunities to attend a professional sports event may be appealing to Downhill Skiing and Snowboarding Enthusiasts.

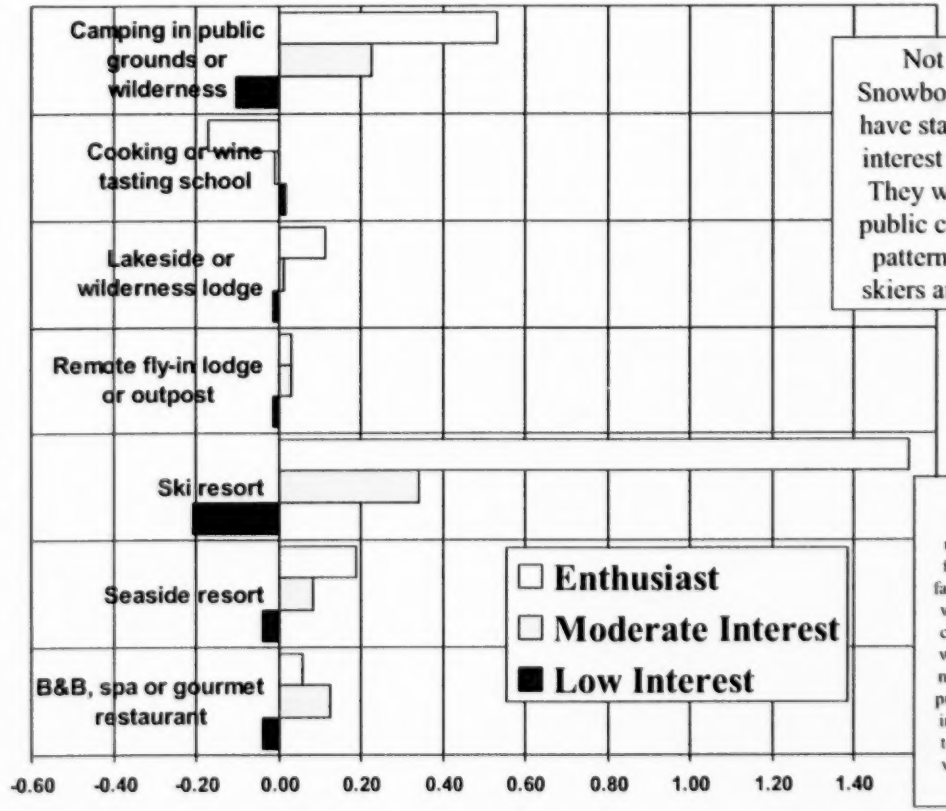
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Not surprisingly, Downhill Skiing and Snowboarding Enthusiasts were more likely to have stayed in a ski resort than those with less interest in downhill skiing and snowboarding. They were also more likely to have stayed at public campgrounds or in the wilderness. This pattern likely reflects the relative interest of skiers and snowboarders in outdoor activities.

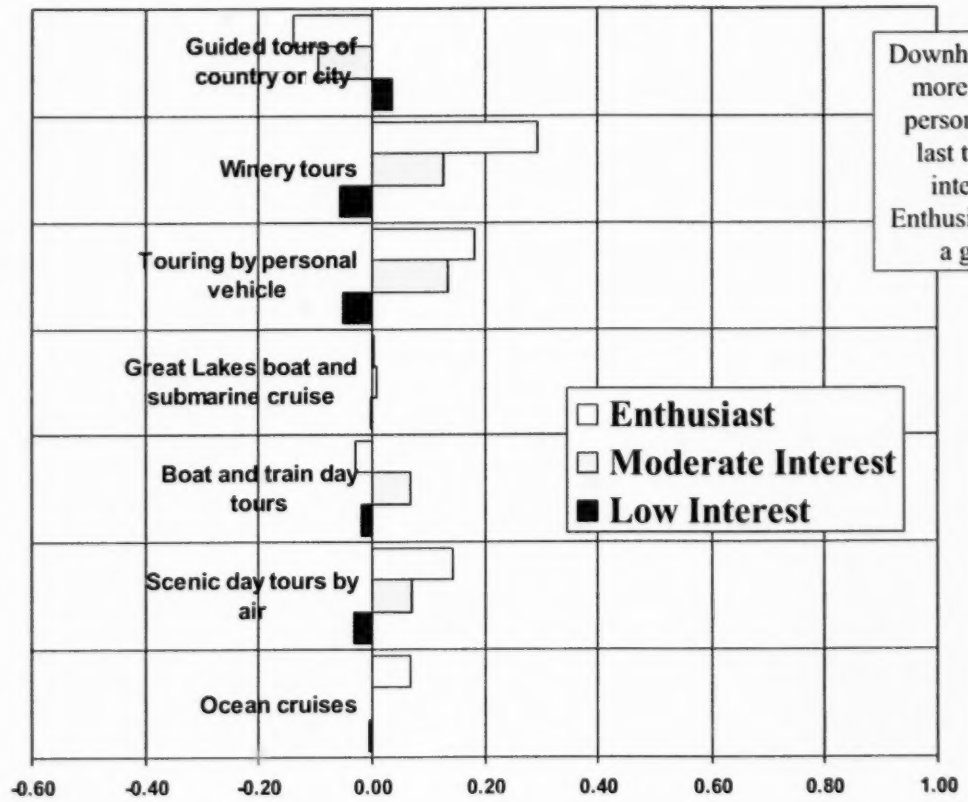
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day and Overnight Touring Activities in the Past Two Years

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Downhill Skiing and Snowboarding Enthusiasts were more likely to have taken winery tours, tours in a personal vehicle, and scenic day tours by air in the last two years than those with a moderate or low interest in downhill skiing and snowboarding. Enthusiasts were less likely than others to have taken a guided tour of the countryside or of a city.

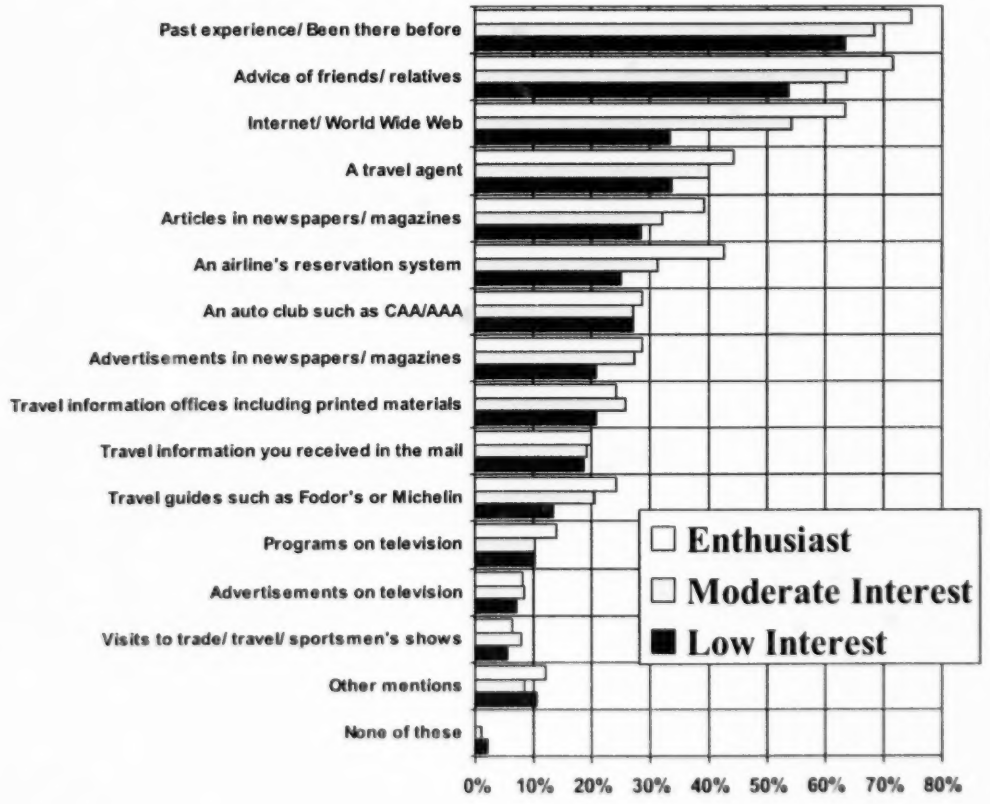
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Sources of Information Consulted to Plan Brief Vacations

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

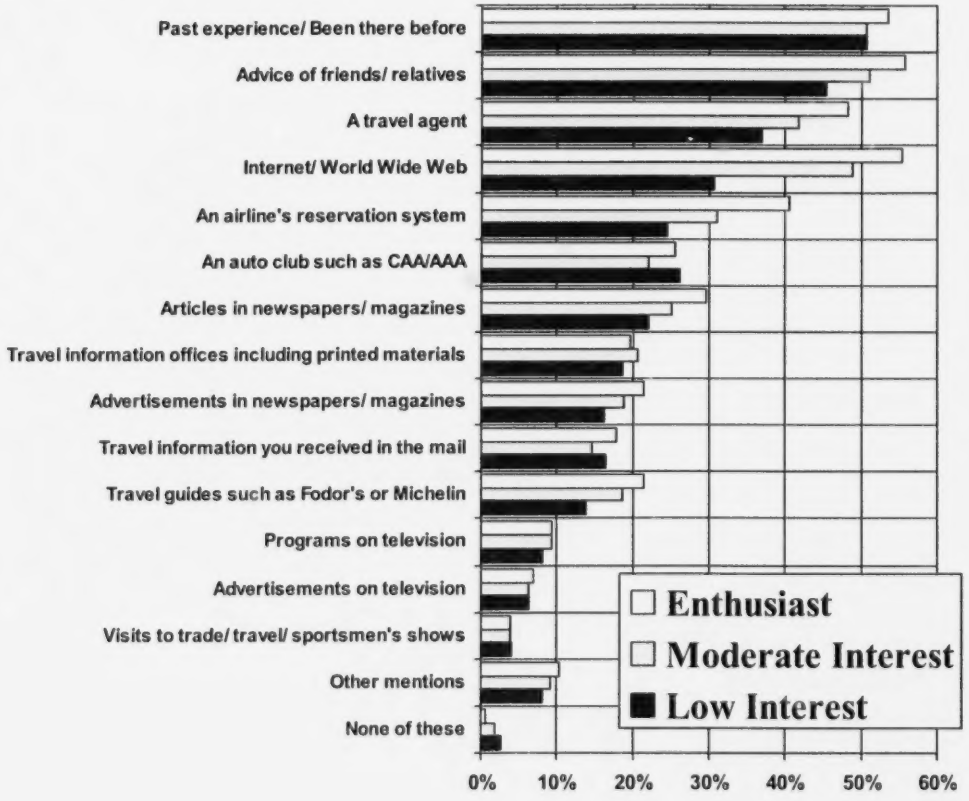


Downhill Skiing and Snowboarding Enthusiasts were more likely than others to rely on prior personal experiences, the advice of family and friends and the Internet when planning brief vacations. They also consulted a larger variety of information sources when planning their brief vacations and especially travel agents, newspaper and magazine articles, airline reservation systems and travel guides (such as Fodor's or Michelin). Those with a moderate interest in downhill skiing and snowboarding also consulted a larger variety of information sources when planning brief vacations than those with low interest, but to a lesser degree than the Enthusiasts. Once again, this pattern may be partially attributed to the relative affluence of Skiing and Snowboarding Enthusiasts.

Sources of Information Consulted to Plan Longer Vacations

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

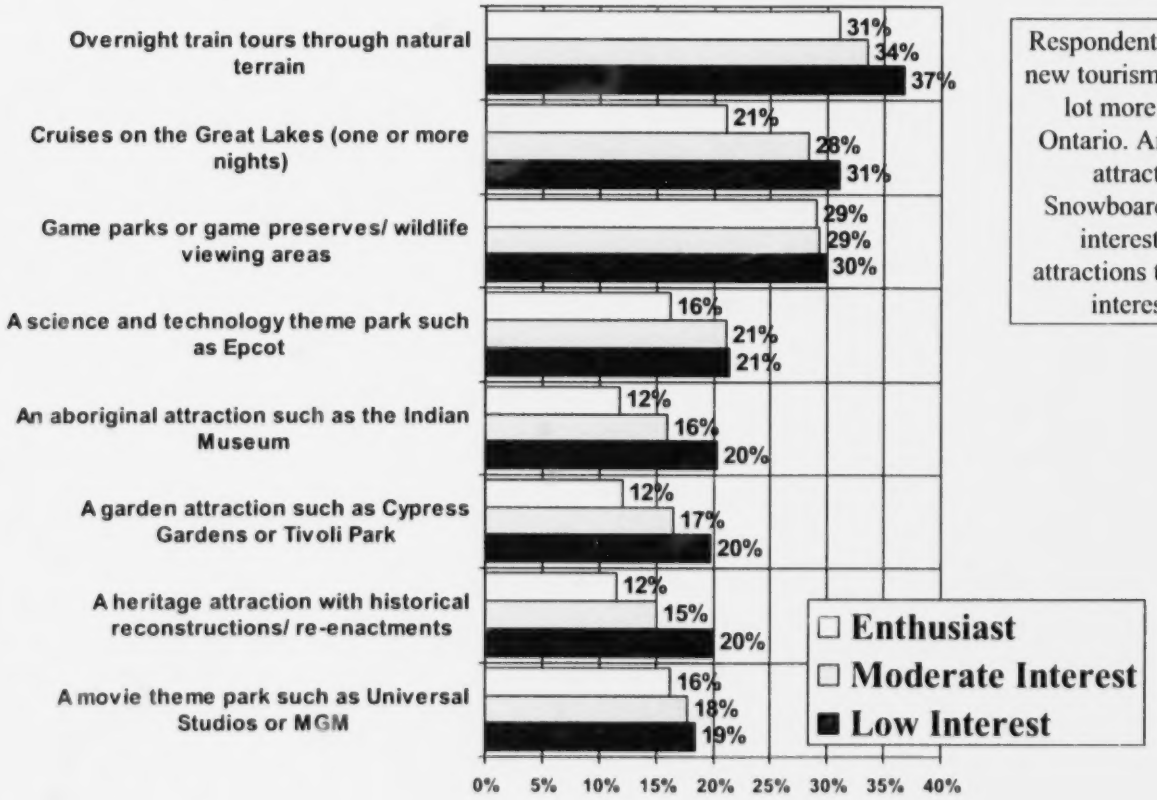


Downhill Skiing and Snowboarding Enthusiasts were also more likely to rely on the advice of family and friends, and on information gathered from the Internet when planning longer vacations. They also consulted a larger variety of information sources when planning their longer vacations and especially travel agents, airline reservation systems, newspaper and magazine articles and advertising, and travel guides (such as Fodor's or Michelin). As with brief vacations, those with a moderate interest in downhill skiing and snowboarding consulted a larger variety of information sources when planning longer vacations than those with low interest, but fewer information sources than the Enthusiasts.

Interest in New Tourism Products

By Interest in Downhill Skiing and Snowboarding (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

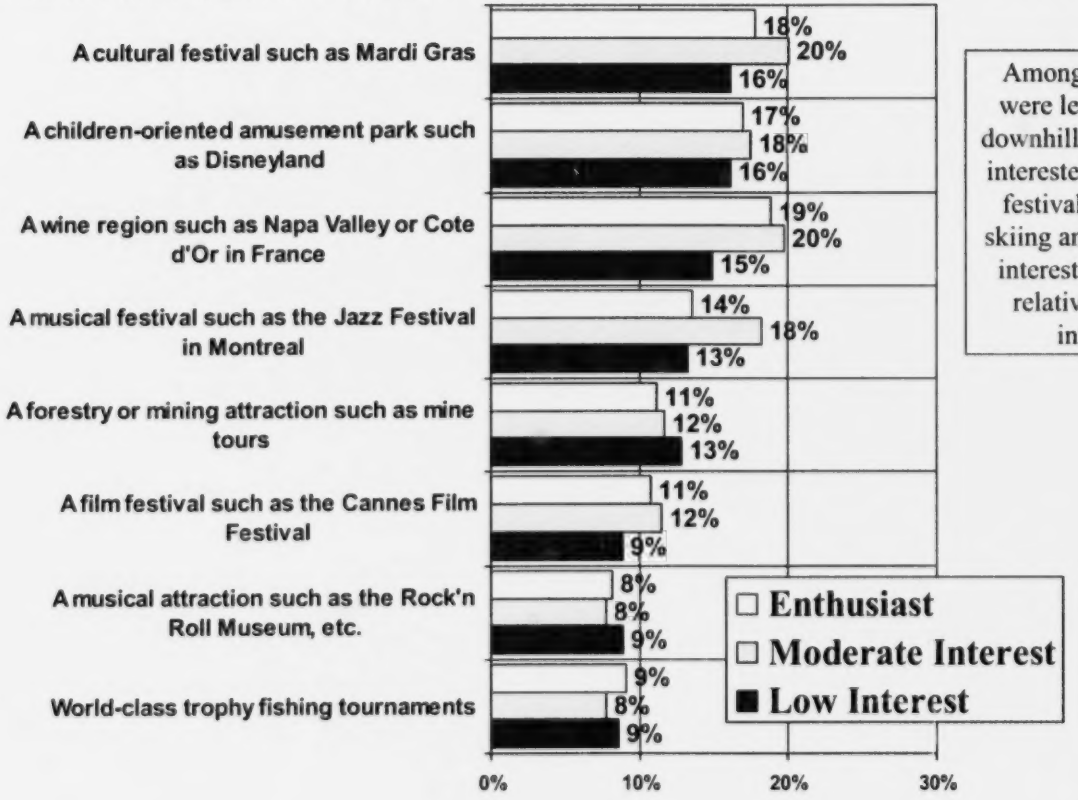


Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Downhill Skiing and Snowboarding Enthusiasts expressed less interest in most of the new tourism attractions than those with moderate or low interest in skiing/ snowboarding.

Interest in New Tourism Products

By Interest in Downhill Skiing and Snowboarding (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

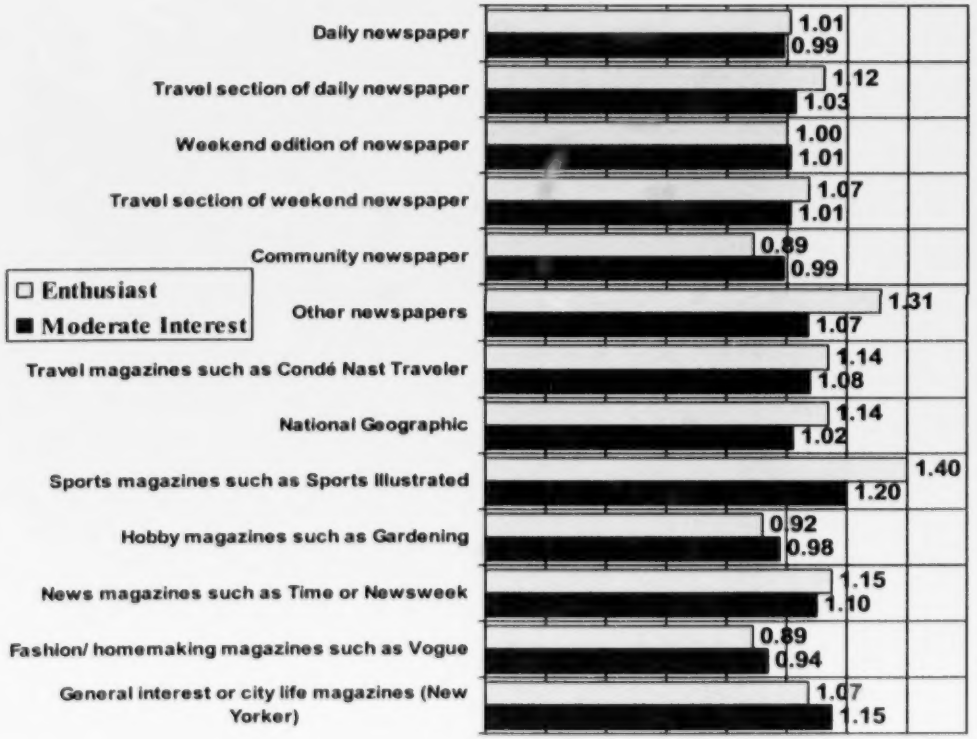


Among the new tourism attractions which were less popular, those with an interest in downhill skiing and snowboarding were more interested in a tour of a wine region or a film festival. Those with a moderate interest in skiing and/or snow- boarding were also more interested in musical and cultural festivals, relative to Enthusiasts or those with low interest in skiing/snowboarding.

Media Index for Print Media: Canada & United States

By Interest in Downhill Skiing and Snowboarding

Percent Reading Each Publication Type Among Those With an Interest in Downhill Skiing and Snowboarding
By Percent Reading Each Type of Publication in General Market
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that sports magazines are the most efficient channels to reach Downhill Skiing and Snowboarding Enthusiasts. Enthusiasts are also more likely to read the news magazines (such as Time), travel magazines, National Geographic, the travel section of their daily newspaper, and other newspapers. Those with a moderate interest in downhill skiing and snowboarding are also more likely to read sports magazines and news magazines, as well as general interest magazines.

Technical Note

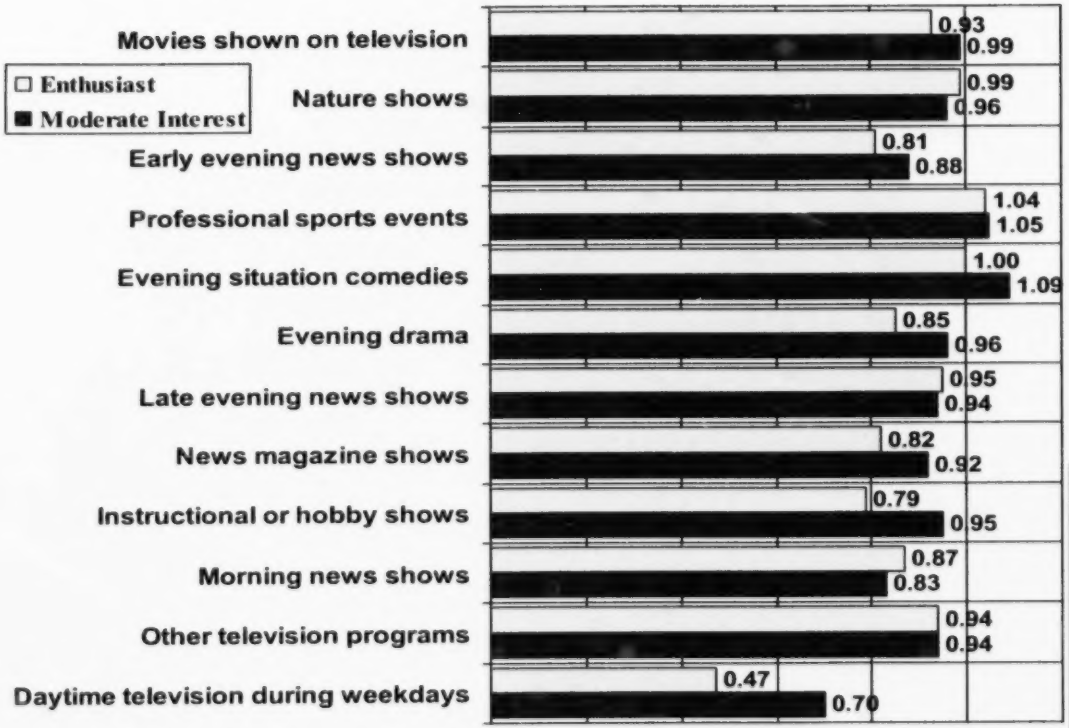
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people very interested in downhill skiing and snowboarding were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States

By Interest in Downhill Skiing and Snowboarding

Percent Watching Each Type of Television Program Among Those With an Interest in Downhill Skiing and Snowboarding By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



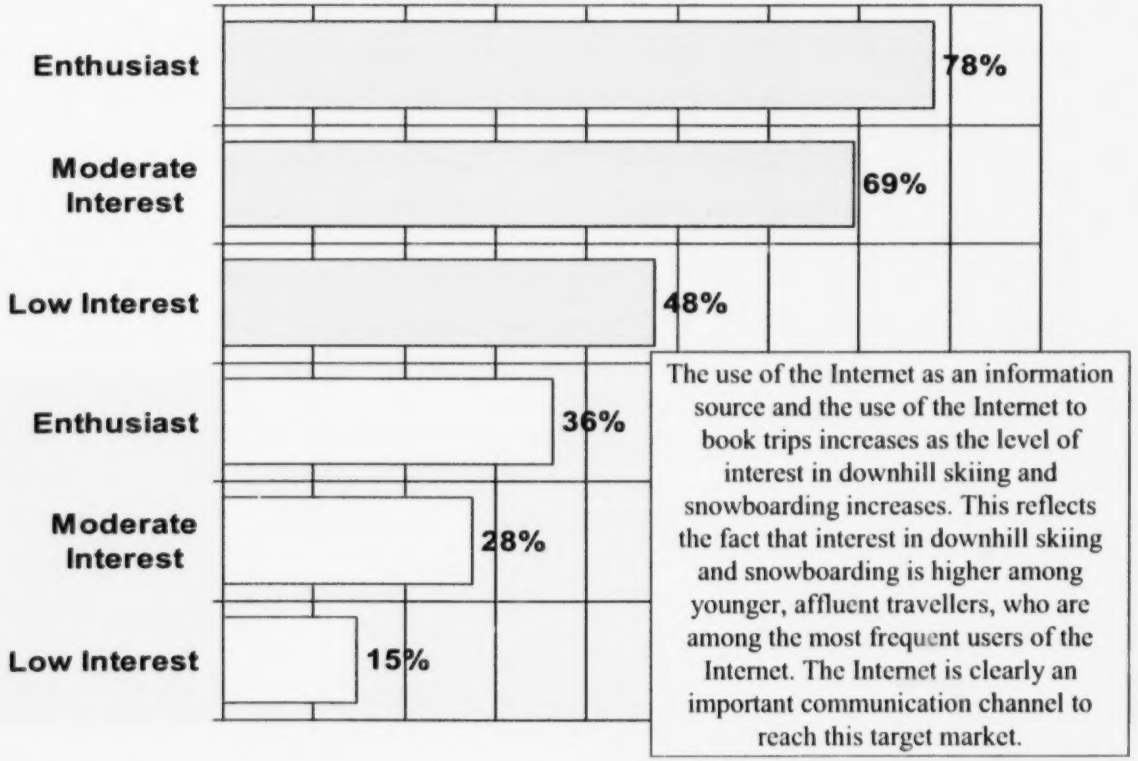
Downhill Skiing and Snowboarding Enthusiasts, and those with a moderate interest, are slightly more likely to watch sports programming on television. Those with a moderate interest in downhill skiing and snowboarding are more likely to watch evening sitcoms.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people very interested in downhill skiing and snowboarding were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet
By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


Enthusiast
78%
Moderate Interest
69%
Low Interest
48%
Enthusiast
36%
Moderate Interest
28%
Low Interest
15%
Uses Internet For Research (Any Topic)
Booked Trip Using Internet (Last Two Years)
The use of the Internet as an information source and the use of the Internet to book trips increases as the level of interest in downhill skiing and snowboarding increases. This reflects the fact that interest in downhill skiing and snowboarding is higher among younger, affluent travellers, who are among the most frequent users of the Internet. The Internet is clearly an important communication channel to reach this target market.

Destination Image Mapping

- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant, it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination, offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

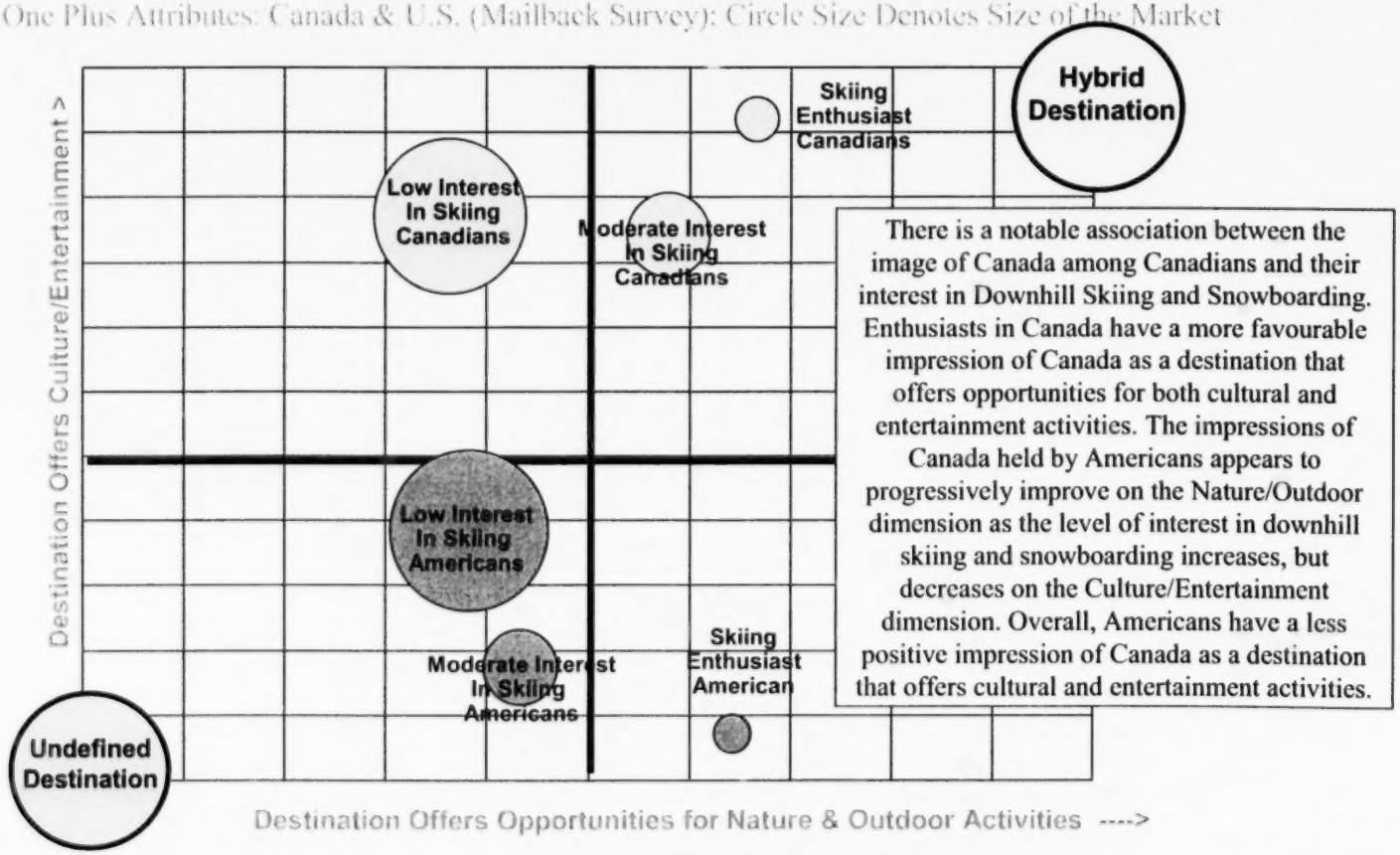
Hybrid Destination
Culture & Entertainment Only
Culture/ Entertainment & Nature/Outdoor Activities
Neither Culture/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Culture & Entertainment ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->
TAMS
Travel Activities & Motivation Survey
TAMS: Interest in Downhill Skiing and Snowboarding Profile Report
Lang RESEARCH

Canada and United States

Canadian Vacation Imagery

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Market

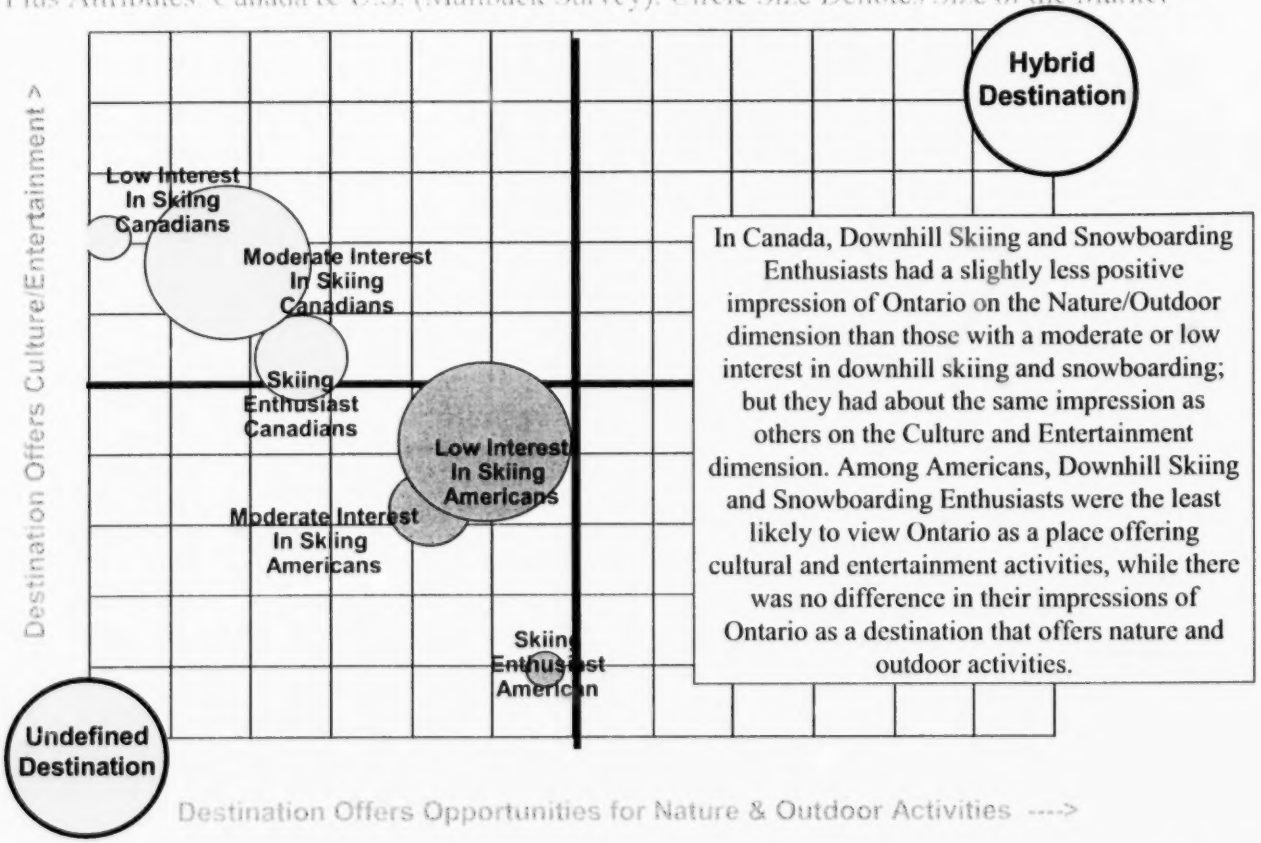

Hybrid Destination
Skiing Enthusiast Canadians
Low Interest In Skiing Canadians
Moderate Interest In Skiing Canadians
Low Interest In Skiing Americans
Moderate Interest In Skiing Americans
Skiing Enthusiast American
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities ---->
There is a notable association between the image of Canada among Canadians and their interest in Downhill Skiing and Snowboarding. Enthusiasts in Canada have a more favourable impression of Canada as a destination that offers opportunities for both cultural and entertainment activities. The impressions of Canada held by Americans appears to progressively improve on the Nature/Outdoor dimension as the level of interest in downhill skiing and snowboarding increases, but decreases on the Culture/Entertainment dimension. Overall, Americans have a less positive impression of Canada as a destination that offers cultural and entertainment activities.

Canada and United States

Ontario Vacation Imagery

By Interest in Downhill Skiing and Snowboarding

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market


Hybrid Destination
Low Interest In Skiing Canadians
Moderate Interest In Skiing Canadians
Skiing Enthusiast Canadians
Low Interest In Skiing Americans
Moderate Interest In Skiing Americans
Skiing Enthusiast American
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities --->

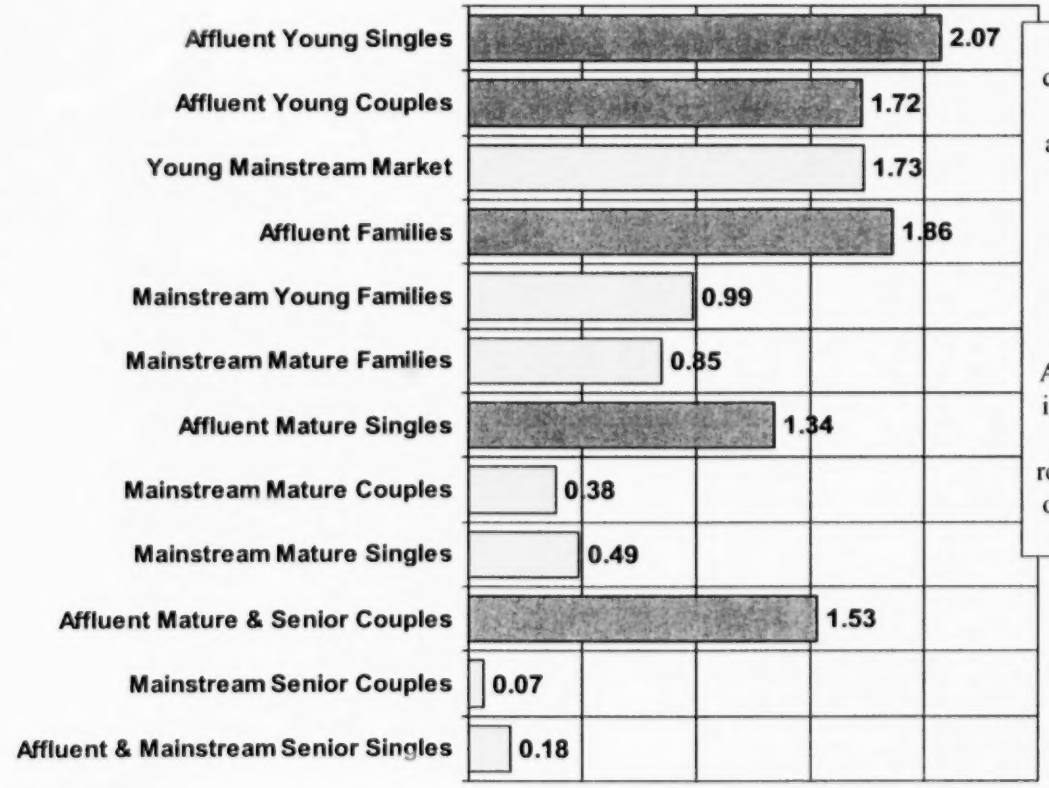
In Canada, Downhill Skiing and Snowboarding Enthusiasts had a slightly less positive impression of Ontario on the Nature/Outdoor dimension than those with a moderate or low interest in downhill skiing and snowboarding; but they had about the same impression as others on the Culture and Entertainment dimension. Among Americans, Downhill Skiing and Snowboarding Enthusiasts were the least likely to view Ontario as a place offering cultural and entertainment activities, while there was no difference in their impressions of Ontario as a destination that offers nature and outdoor activities.

Overall Market Potential

Interest in Downhill Skiing and Snowboarding: Canada

Interest in Downhill Skiing and Snowboarding By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote downhill skiing and snowboarding. This index indicates that in Canada, Affluent Singles, Affluent Young Couples, the Young Mainstream Market and Affluent Families represent the prime target markets for such initiatives. The Affluent Mature Singles and Affluent Mature & Senior Couples also represent important secondary markets for downhill skiing promotional activities. These six markets represent 38.5 % of Canadian travellers (although only a portion of these are interested in downhill skiing and/or snowboarding).

Technical Note

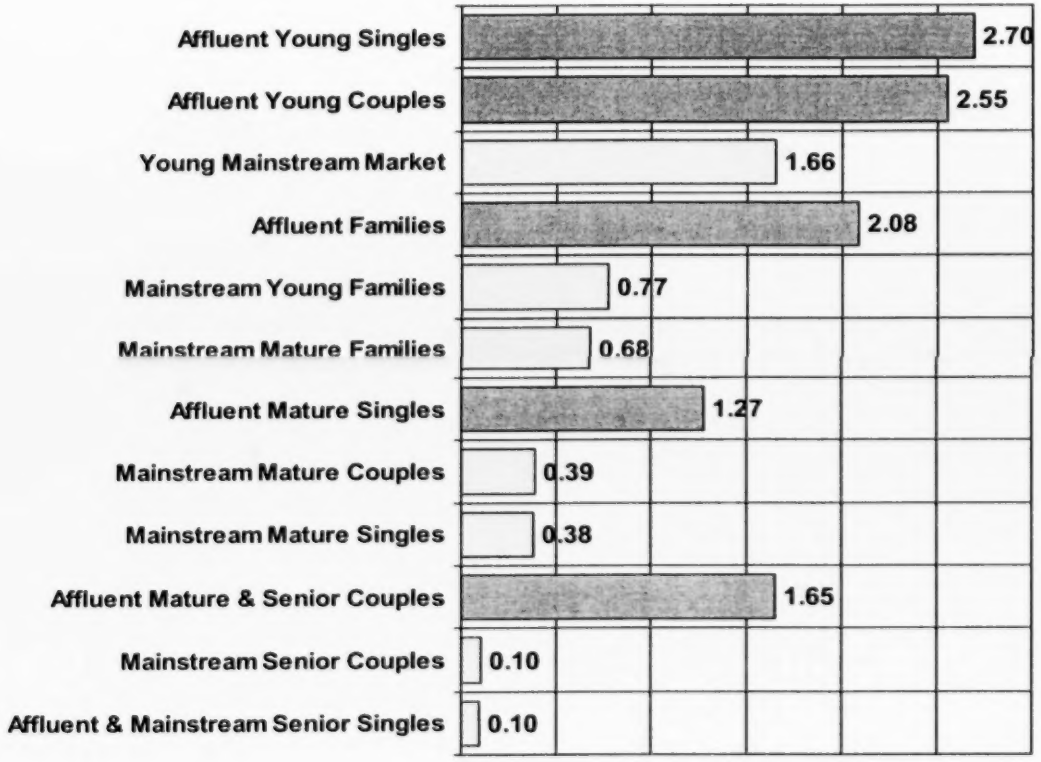
The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in Downhill Skiing and Snowboarding related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Downhill Skiing and Snowboarding: United States

Interest in Downhill Skiing and Snowboarding By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index for the United States shows a similar pattern as that observed for Canada. In the United States, the Affluent Young Singles, Affluent Young Couples and Affluent Families are more likely to be responsive to these initiatives than other affluent segments. The Young Mainstream Market, Affluent Mature Singles and Affluent Mature & Senior Couples also represent important secondary markets for downhill skiing and snowboarding-related tourism promotional activities. These six segments represent 39.1 % of U.S. travellers.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in Downhill Skiing and Snowboarding related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Travel Activities & Motivation Survey

TAMS Technical Appendices

(For Use With the TAMS Reports)

TAMS
Travel Activities &
Motivation Survey

March, 2001

Lang

Appendix One

Statistical Precision and Confidence Intervals

Since the Travel Activities & Motivation Survey (TAMS) is based on a random probability sample (rather than a complete census), the statistics reported in this study are estimates. The accuracy of these estimates will vary from analysis to analysis depending on the sample size, the type of measurement reported and measurement variations. The statistical precision associated with any given estimate is reflected by its confidence interval.

A confidence interval is an estimate of the range of values which would be expected by chance alone for a selected probability level. For example, the "95 % confidence interval" is the range of values which would be expected to occur randomly 19 times out of 20 (or 95 % of the time). Thus, if a survey found that 50 % of the individuals in a sample of 500 were interested in a given activity, the 95 % confidence interval for this estimate would be ±3.5 % (or between 53.5 % to 46.5 %). This means that if this survey were conducted 20 times with the same size sample, the estimated level of respondents interested in a given activity would fall between 53.5 % and 46.5 % nineteen times out of 20.

The estimated confidence interval is affected by several factors including the sample size, the type of measure taken (i.e., whether the measurement may assume two values such as "yes" or "no", or many values such as "household income") and the level of variation which exists within the data. As a guideline to interpreting the results of this study, estimates of the 95 % confidence intervals are provided for various sample sizes in the table below:

Number of Cases in Sample

Percent	46000	12000	5000	1000	500	100
50.00%	0.05%	0.20%	0.49%	2.45%	4.90%	24.50%
40.00%	0.05%	0.20%	0.47%	2.35%	4.70%	23.52%
30.00%	0.04%	0.17%	0.41%	2.06%	4.12%	20.58%
20.00%	0.03%	0.13%	0.31%	1.57%	3.14%	15.68%
10.00%	0.02%	0.07%	0.18%	0.88%	1.76%	8.82%
5.00%	0.01%	0.04%	0.09%	0.47%	0.93%	4.66%
2.00%	0.00%	0.02%	0.04%	0.19%	0.38%	1.92%

Appendix Two

Telephone Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A.*
Number of Interviews		46,782	28,397	18,385
Gender	Male	45.0 %	45.1 %	45.0 %
	Female	55.0 %	54.9 %	55.0 %
Age	18 to 25	13.6 %	13.3 %	13.9 %
	26 to 34	20.6 %	20.8 %	20.5 %
	36 to 44	23.3 %	24.1 %	22.8 %
	46 to 54	17.5 %	16.7 %	18.1 %
	56 to 65	11.2 %	11.4 %	11.0 %
	66 Plus	13.7 %	13.7 %	13.7 %
Education Level	High/Trade School	42.5 %	48.6 %	38.6 %
	College or University	49.3 %	46.7 %	51.0 %
	Advanced University Degree	8.1 %	4.7 %	10.4 %
Household Income	Under $20,000	14.8 %	17.8 %	12.8 %
	$20,000 to $40,000	22.9 %	24.6 %	21.8 %
	$40,000 to $60,000	18.9 %	19.0 %	18.9 %
	$60,000 to $80,000	11.8 %	11.7 %	11.8 %
	$80,000 to $100,000	6.4 %	6.3 %	6.4 %
	$100,000 Plus	8.8 %	7.4 %	9.7 %
	Refused/Don't Know	16.5 %	13.2 %	18.6 %

Appendix Two

Mailback Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A.*
Number of Interviews		11,892	5,490	6,402
Gender	Male	43.7 %	44.0 %	43.6 %
	Female	56.3 %	56.0 %	56.4 %
Age	18 to 25	8.3 %	9.7 %	7.1 %
	26 to 34	17.9 %	19.1 %	16.8 %
	36 to 44	24.8 %	25.3 %	24.3 %
	46 to 54	21.7 %	20.0 %	23.1 %
	56 to 65	14.4 %	14.0 %	14.7 %
	66 Plus	13.0 %	11.9 %	14.0 %
Education Level	High/Trade School	31.8 %	38.0 %	26.5 %
	College or University	56.5 %	55.1 %	57.6 %
	Advanced University Degree	11.7 %	6.9 %	15.8 %
Household Income	Under $20,000	8.9 %	10.4 %	7.5 %
	$20,000 to $40,000	21.8 %	23.1 %	20.7 %
	$40,000 to $60,000	22.3 %	22.6 %	22.1 %
	$60,000 to $80,000	15.6 %	15.5 %	15.7 %
	$80,000 to $100,000	8.5 %	8.8 %	8.2 %
	$100,000 Plus	11.6 %	10.8 %	12.3 %
	Refused/Don't Know	11.3 %	8.8 %	13.5 %

Appendix Three

Household Life Cycle Stage

The Household Life Cycle Stage variable has been constructed taking the following variables into consideration: The age of the respondent, the age of all children under 21 living in the household, and the marital status of the respondent. There are eight life cycle stages identified in this variable:

- Young Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Families: At least one child (of respondent) under 13 living in the home; No restrictions for age or marital status
- Mature Families: At least one child (of respondent) under 21 living in the home; No children under 13 living in the home; No restrictions for age or marital status
- Mature Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Mature Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Senior Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older
- Senior Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older

Appendix Four:
Lifespan Demographic Segments
- Method Used to Construct Segmentation -

Throughout this report, the TAMS data will be examined using a market segmentation known as the Lifespan Demographic Segments. This scheme identifies various demographic sectors in the market with common vacation patterns and interests.

The Lifespan Demographic Segmentation scheme is an anchored segmentation where the data has been aggregated by life cycle stage, education level and household income. Households may be assigned to any given segment with information about the household life cycle stage, the respondent's education and household income. As such, this scheme is a powerful tool to identify strategic segments.

The Lifespan Demographic Segmentation was developed using the Ontario Tourism Marketing Partnership tracking program, based on 7,241 interviews conducted between July 12, 1999 and April 26, 2000. The segmentation scheme uses information about the types of trips taken by each household, the respondent's tendency to research vacations, and the household's vacation preferences and interests. Thirty-one core segmentor variables were used in this analysis, including: The incidence of 19 types of vacation travel (e.g., family urban explorations, couples retreats, family visits, adventure travel); the extent to which vacations are carefully planned; the amount of information consulted to plan vacations; interest in opportunities to learn while on vacation; interest in novel and exotic destinations; interest in vacations suitable for families; the appeal of vacation packages; the appeal of outdoor vacations; the appeal of cultural exploration; the appeal of pampering and entertainment; the appeal of excitement and nightlife; and the appeal of relaxing in a quiet setting while on vacation.

Appendix Four: Lifespan Segmentation Descriptions

Youth Segments

The three youth segments represent 20.3 % of the total market. Two of these are classified as Affluent Segments because of their household incomes and/or level of education. These households are all under 35, do not have children and are single or married couples.

Affluent Young Singles

- 5.9 % of market; 6.5 % of Canadian market; 5.8 % of U.S. market
- Life Cycle Stages: 100 % young singles; 64.0 % of respondents male
- Average Age: 25.3 years; Age Range: 54.5 % 18 to 25; 45.5 % 26 to 35
- Education: 67.7 % university or college educated; 9.7 % with advanced degrees (e.g., master's)
- Average Household Income: $72,000; Income Categories: 68.7 % $40K to $80K; 31.3 % $80K plus

Affluent Young Couples

- 2.7 % of market; 3.9 % of Canadian market; 2.6 % of U.S. market
- Life Cycle Stages: 100 % young couples; 42.8 % of respondents male
- Average Age: 28.9 years; Age Range: 18.8 % 18 to 25; 81.2 % 26 to 35
- Education: 100 % university or college educated; 17.8 % with advanced degrees (e.g., master's)
- Average Household Income: $74,400; Income Categories: 66.2 % $40K to $80K; 33.8 % $80K plus

Mainstream Youth Market

- 11.8 % of market; 13.2 % of Canadian market; 11.6 % of U.S. market
- Life Cycle Stages: 73 % young singles; 27 % young couples; 56.9 % of respondents male
- Average Age: 25.0 years; Age Range: 57.4 % 18 to 25; 42.6 % 26 to 35
- Education Level: 53 % university or college educated; 4.5 % with advanced degrees (e.g., master's)
- Average Household Income: $24,600; Categories: 93.3 % less than $40K; 6.8 % $40K to $80K

Appendix Four: Lifespan Segmentation Descriptions

Family Segments

The three family segments represent 36.2 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. All of these households have children under 21 and are primarily married. The Mainstream Young Families have at least one child 12 or younger while the Mainstream Mature Families have children between the ages of 13 and 21 (but no children 12 and under).

Affluent Families

- 6.6 % of market; 5.8 % of Canadian market; 6.7 % of U.S. market
- Life Cycle Stages: 69.9 % young families; 26.4 % mature families; 50 % of respondents male
- Average Age: 41.2 years; Age Range: 23.9 % under 35; 46.8 % 36 to 45; 29.3 % 46 and older
- Education: 100.0 % university or college educated; 29.1 % with advanced degrees (e.g., master's)
- Average Household Income: $107,400; Income Categories: 2.3 % $40K to $80K; 97.7 % $80K plus

Mainstream Young Families

- 23.0 % of market; 20.1 % of Canadian market; 23.4 % of U.S. market
- Life Cycle Stages: 100 % families with children 12 or younger; 42.9 % of respondents male
- Average Age: 35.3 years; Age Range: 52.8 % under 35; 37.1 % 36 to 45; 10.1 % 46 and older
- Education: 50 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $42,800; Income Categories: 49.0 % less than $40K; 51.0 % $40K plus

Mainstream Mature Families

- 6.6 % of market; 8.1 % of Canadian market; 6.4 % of U.S. market
- Life Cycle Stages: 100 % families with children between 13 and 21; 45.1 % of respondents male
- Average Age: 45.3 years; Age Range: 7.8 % under 35; 47.6 % 36 to 45; 44.6 % 46 and older
- Education Level: 47 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $48,200; Income Categories: 37.9 % less than $40K; 62.1 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature Segments

The three mature segments represent 30.4 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. These households are all between 36 and 64 and do not have children. (Note: 3.8 % of the mature market has been classified with seniors in the Affluent Mature & Senior Couples).

Affluent Mature Singles

- 5.1 % of market; 2.4 % of Canadian market; 5.4 % of U.S. market
- Life Cycle Stages: 100 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 48.5 years; Age Range: 40.2 % 36 to 45; 37.6 % 46 to 55; 22.2 % 56 to 65
- Education: 100 % university or college educated; 26.5 % with advanced degrees (e.g., master's)
- Average Household Income: $71,000; Income Categories: 72.8 % $40K to $80K; 27.2 % $80K plus

Mainstream Mature Couples

- 12.8 % of market; 18.0 % of Canadian market; 12.3 % of U.S. market
- Life Cycle Stages: 100 % mature couples (36 to 65); 52.1 % of respondents male
- Average Age: 52.1 years; Age Range: 23.4 % 36 to 45; 38.4 % 46 to 55; 38.2 % 56 to 65
- Education: 48 % university or college educated; 6.0 % with advanced degrees (e.g., master's)
- Average Household Income: $49,600; Income Categories: 34.1 % less than $40K; 59.8 % $40K plus

Mainstream Mature Singles

- 8.6 % of market; 6.8 % of Canadian market; 8.9 % of U.S. market
- Life Cycle Stages: 73 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 50.2 years; Age Range: 35.0 % 36 to 45; 34.0 % 46 to 55; 31.1 % 56 to 65
- Education Level: 42 % university or college educated; 3.9 % with advanced degrees (e.g., master's)
- Average Household Income: $28,800; Income Categories: 84.0 % less than $40K; 16.0 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature/Senior Segments

The three mature/senior segments represent 16.8 % of the total market. One of these segments is classified as an affluent segment because of its household incomes and/or level of education. The Affluent Mature and Senior Couples are primarily (85 %) from the mature market while the Mainstream Senior Couples and Senior Singles are all over 66 years old.

Affluent Mature and Senior Couples

- 4.5 % of market; 3.5 % of Canadian market; 4.7 % of U.S. market
- Life Cycle Stages: 85 % mature couples (35 to 65); 15 % senior couples (66 plus); 54.6 % male
- Average Age: 54.5 years; Age Range: 21.0 % 36 to 45; 37.3 % 46 to 55; 41.7 % 56 plus
- Education: 100 % university or college educated; 30.8 % with advanced degrees (e.g., master's)
- Average Household Income: $108,600; Income Categories: 100 % $80K plus

Mainstream Senior Couples

- 5.0 % of market; 6.5 % of Canadian market; 4.8 % of U.S. market
- Life Cycle Stages: 100 % senior couples (66 plus); 56.1 % of respondents male
- Average Age: 72.7 years; Age Range: 100 % 66 plus
- Education: 42.4 % university or college educated; 5.8 % with advanced degrees (e.g., master's)
- Average Household Income:$37,900; Income Categories: 57.4 % Less than $40K; 42.6 % $40K plus

(Affluent and Mainstream) Senior Singles

- 7.3 % of market; 5.1 % of Canadian market; 7.5 % of U.S. market
- Life Cycle Stages: 100 % senior singles; 35.6 % of respondents male
- Average Age: 74.9 years ; Age Range: 100 % 66 plus
- Education Level: 43 % university or college educated; 8.0 % with advanced degrees (e.g., master's)
- Average Household Income:$28,600; Income Categories: 78.7 % Less than $40K; 21.3 % $40K plus

Appendix Three

Factor Analysis of Vacation Experiences Sought During Past Two Years

The vacation experiences sought in the last two years were submitted to a factor analysis to identify underlying vacation experiences sought in pleasure travel. Factor analysis is a statistical technique which identifies and uses the association between individual responses to generate more general (or abstract) measures of the vacation experiences sought.The factors may be used to generate factor scores which reflect the general vacation experiences sought. This analysis identified the following five vacation experience factors:

Exploration: To visit historical sites and important places in history; To see natural wonders and important natural sites; To experience different cultures and ways of life; To experience unspoiled nature

Personal Indulgence: To visit a popular, trendy place; To visit casinos and gamble; To experience "the good life" - fine cuisine, being pampered; To experience city life (e.g., nightlife, shopping, museums)

Romance & Relaxation: To rest, relax and recuperate; For intimacy and romance; To spend quality time with the family away from home

Sports, Hobbies & Learning: To participate in a hobby or sport (e.g., golf, fishing, photography); To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Socializing: To visit friends or relatives who live in another city or country; To spend time with a group of good friends; To be someplace that feels familiar and safe

Appendix Four
Factor Analysis of Outdoor Activities While Travelling

The outdoor vacation activities sought in the last two years were submitted to a factor analysis to identify general outdoor activities sought in travel. Factor analysis is a statistical technique which uses the association between individual responses to construct more general (or abstract) categories of outdoor activities sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of outdoor activities have been pursued by various types of travellers. This analysis identified the following 17 types of outdoor activities:

Competitive Sports: Playing basketball; Baseball; Football; Volleyball; Bowling; Soccer; Chess or backgammon; Tennis

Nature Sports: Whitewater rafting; Kayaking & canoeing; Hiking or backpacking; Horseback riding

Water Sports: Sailing; Windsurfing; Scuba diving

Extreme Sports: Hang-gliding; Hot-air ballooning; Parachuting; Bungee jumping

Golfing: Golfing at a resort; Taking a golf package tour; Playing occasional golf game

Biking: Recreational biking; Mountain biking; Biking on overnight tour trip

Motorcycling: Motorcycling on overnight touring trip; Motorcycling - Day excursion

Fishing: Salt water fishing; Fresh water fishing; Motorboating

Hunting: Hunting big game; Hunting small game

Fitness: Jogging outdoors; Working out in fitness centre

Skiing & Snowboarding: Cross-country skiing (day activity; overnight tour group); Downhill skiing; Snowboarding

Snowmobiling: Snowmobiling as an overnight tour trip; Snowmobiling on organized trails

Skating & Hockey: Ice skating; Playing ice hockey; In-line/Roller-skating

Rock & Ice Climbing: Rock climbing; Ice climbing; Heli-skiing

Swimming & Sunbathing: Sunbathing or sitting on a beach; Swimming in oceans; Swimming in lakes

Natural Sightseeing: Wildflower & flora viewing; Birdwatching; Going on picnics in park settings

Natural Phenomena: Seeing the northern lights or other Arctic experiences; Whale watching

Appendix Five

Factor Analysis of Cultural & Entertainment Activities Participated In

The cultural and entertainment vacation activities sought in the last two years were submitted to a factor analysis to identify general categories of cultural and entertainment activities sought during travel. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of cultural and entertainment activities that tend to be sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of cultural and entertainment activities have been pursued by various segments of the travel market. This analysis identified the following 15 activity types:

Shopping & Dining: **Shopping or browsing**: Clothing, shoes, jewelry; Bookstores and music stores; Local arts and crafts; Gourmet food; **Restaurant dining**: Regional or local cooking; Acclaimed restaurants

Museums, Art Galleries & Historical Sites: General history/heritage museums, Historical sites (e.g., Statue of Liberty, Fort Alamo), Science & technology museums, Historical replicas/re-enactments, Art galleries

High Arts: Opera, Classical concerts, Ballet or other dance performance, Live theatre

Theme Parks: Movie theme parks (MGM studios), Science & technology theme parks (Epcot), Amusement parks (Disneyland)

Professional Sports: Baseball, Football, Basketball, Ice hockey, Professional golf

Zoos, Aquariums, Planetariums: Zoos, Aquariums, Children's museums, Planetariums

Agricultural & Local Fairs: Farmers' fair or market, Local festivals or fairs, Pick-your-own farms or participating in harvesting, Shop or browse for antiques

Concerts, Carnivals or Festivals: Music festivals, Carnivals such as Mardi Gras, Jazz concerts, Rock & roll concerts, Musical attractions like Rock'n Roll Museum

Aboriginal Cultural Experiences: Aboriginal cultural experiences in remote settings, Powwows or other aboriginal celebrations, Aboriginal attractions such as the Indian Museum

Gardening & Natural Wonders: Botanical gardens, Garden attractions such as Cypress Gardens or Tivoli Park, Natural wonders such as Niagara Falls or the Grand Canyon

Cultural Festivals: Literary festivals or events, Theatre festivals, International film festivals

National/International Sporting Events: National/International sporting events, Professional figure skating

Gambling & Racing: Horse racing, Casinos, Auto racing

Rodeo & Amateur Tournaments: Western theme events such as rodeos, Amateur sports/arts/hobby tournaments

French Canadian Cultural Experiences: French Canadian cultural experiences

Appendix Six
Factor Analysis of Accommodation-Related Activities Participated In

The types of accommodation-related activities participated in during the last two years were submitted to a factor analysis to identify general activity-related accommodation types. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of activity-related accommodations. The factors may be used to generate factor scores which measure the degree to which general types of activity-related accommodations have been stayed in by each segment of the travel market. This analysis identified the following seven types of activity-related accommodations:

Camping: Camping outside of public camp grounds, Camping in public camp grounds, Camping in wilderness settings

Cooking & Wine Tasting Schools: Staying at cooking school, Staying at wine tasting schools

Lakeside or Wilderness Lodges (Vehicle Accessible): Vehicle accessible wilderness lodge, Lakeside resort in summer, Lakeside resort in winter

Remote Fly-in Lodges or Outposts: Staying at remote fly-in outpost, Staying at remote fly-in lodge

Ski Resorts: Staying at ski resort in summer, Staying at ski resort in winter

Seaside Resorts: Staying at seaside resort in winter, Staying at seaside resort in summer

Bed & Breakfast, Health Spas & Gourmet Restaurants With Accommodations: Staying at bed & breakfast, Staying at health spa, Staying at gourmet restaurants

Appendix Seven
Factor Analysis of Tours & Cruises Taken During Last Two Years

The types of tours and cruises taken during the last two years were submitted to a factor analysis to identify general tour/cruise types. Factor analysis is a statistical technique which uses the association between responses to individual items to construct more general (or abstract) categories of touring activities. The factors may be used to generate factor scores, which measure the degree to which each category of tours has been taken by various types of travellers. This analysis identified seven types of tours and cruises:

Tours By Personal Vehicles: Coastal or lakeshore scenic drives by day, Wandering around small villages & towns - overnight

Guided Bus Tours: Scenic day tours in countryside by bus, Guided bus day tours in cities, Guided scenic tours of countryside involving an overnight stay

Wine Tours: Going to wineries for day visits, Touring a region's wineries involving an overnight stay

Specialty Cruises: Great Lakes cruises by boat involving an overnight stay, Submarine cruises involving an overnight stay

Scenic Tours By Boat or Train: Scenic day or evening tour by boat, Scenic day tours by train

Scenic Day Tour By Air: Scenic day tour by air

Ocean Cruises: Ocean cruises

Appendix Eight
Factor Analysis of Canada's Image Attributes

The image ratings of Canada and Ontario were factor analysed to identify the primary image dimensions upon which Canada and Ontario were assessed. Factor analysis is a statistical technique which uses the association between each individual image attribute to construct more general image attributes. The more general image dimensions identified through this process are considered to reflect the underlying (or true) impressions of Canada and Ontario that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores which measure the degree to which each general impression of Canada or Ontario is held by the respondent. The 25 image factors were grouped into two broader image dimensions as follows:

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities. The specific image attributes that tend to be associated with this factor include: A popular, trendy place; A place with many cultural attractions and events; A great place to experience city life (e.g., nightlife, shopping); A place with interesting shops; A place you go for romance; A great place to see historical sites and important places in history; A place with lots of things for young adults to see and do; A place with lots for families to see and do; A great place to experience different cultures and ways of life; A place with lots of things for mature adults to see and do.

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness. The specific image attributes that tend to be associated with this factor include: A great place for hunting; A place that respects the natural environment; One of the best destinations for outdoor activities; A place with beautiful scenery; A place that is very clean and well cared for; A place that is safe for tourists; A great place for adventure and excitement; A great place to relax and get away from it all.

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities.

- A popular, trendy place
- A place with many cultural attractions and events
- A great place to experience city life (e.g., nightlife, shopping)
- A place with interesting shops
- A place you go for romance
- A great place to see historical sites and important places in history
- A place with lots of things for young adults to see and do
- A place with lots for families to see and do
- A great place to experience different cultures and ways of life
- A place with lots of things for mature adults to see and do

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness.

- A great place for fishing
- A great place for hunting
- A place that respects the natural environment
- One of the best destinations for outdoor activities
- A place with beautiful scenery
- A place that is very clean and well cared for
- A place that is safe for tourists
- A great place for adventure and excitement
- A great place to relax and get away from it all